Janeway Documentation

Release 1.4.1

Andy Byers, Mauro Sanchez & Martin Paul Eve

Jun 15, 2022

Contents

Janeway is a digital platform for publishing scholarly articles online, from submission and review to editing, production and final publication. This guide, whilst not exhaustive, provides various guides for setting up an install of Janeway, configuring journals and running articles through the workflow

This guide has been written to avoid using language like “easy”, “just” or “simply”. A massive shout out to Emma Barnes and her awesome site https://www.justsimply.dev/

CHAPTER 1

Frequently Asked Questions

1.1 Assigning Users Roles

Janeway has nine roles.

- Author
- Editor
- Section Editor
- Reviewer
- Copyeditor
- Typesetter
- Proofreader
- Proofing Manager (this role will be deprecated in version 1.4)
- Production Manager

To add users to a role you can use the *Enrol Users* interface.

1.2 Email Logging

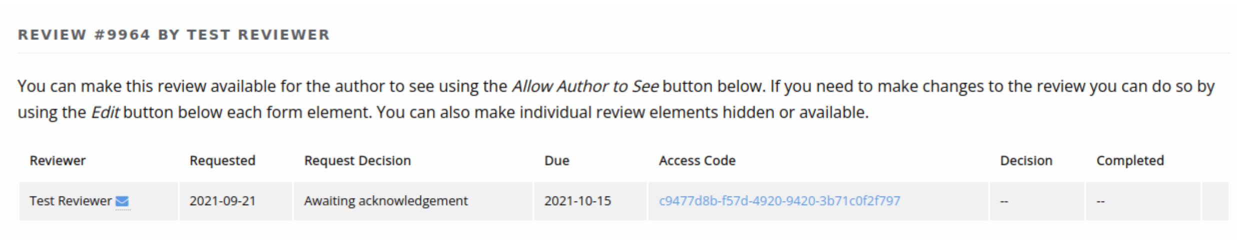
Outgoing emails (either sent by Janeway or by an Editor) are all collected in the article log.

You can view and Article's log by accessing an article either through its workflow stage or through the archive (Dashboard -> Left hand menu -> Back Content -> Articles) and using the "Stages, Logs and More" drop down select Log. image

1.3 Reviewer Cannot Access a Review

Its possible because of how emails are edited that an outgoing review request will not contain a valid review request URL. We recommend you reset your review_assignment email in this instance and here is a workaround to assist reviewers who have received the email without the link:

1. Go to the article review page.
2. For the Reviewer having the issue select the View button.
3. You'll see an Access Code like below image.
4. Copy this link and send it to the reviewer.



CHAPTER 2

Workflow Guides

2.1 Author Guide

The Author role is granted to all users of a given journal whey they begin a submission. This guide will help you make a submission in Janeway.

2.1.1 Creating a New Submission

There are various pages throughout Janeway what allow you to start a new submission notably:

1. From the drop down in the top right hand corner where you name is displayed
2. From the Author block on the Dashboard (see image below)
3. From the Submission page on the main site if it is enabled

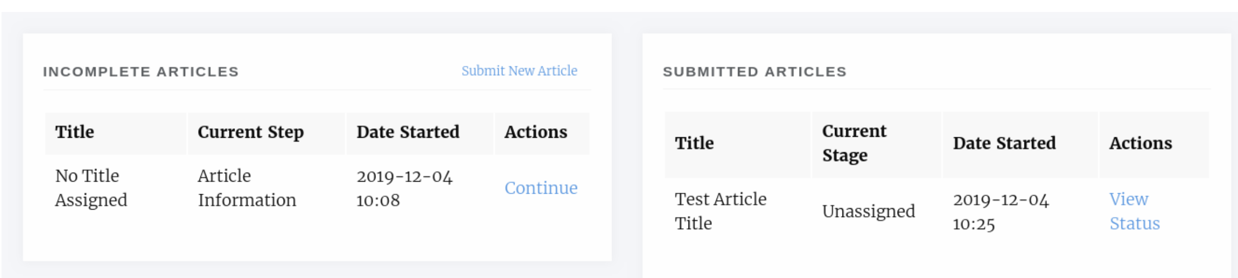


Fig. 1: The author block on the dashboard

2.1.2 Notes on the Submission System

We've taken great pains to make our submission system as easy to use as possible but acknowledge that it may not be as easy for some to use as others. We've put this guide together to help anyone who has trouble submitting a paper to

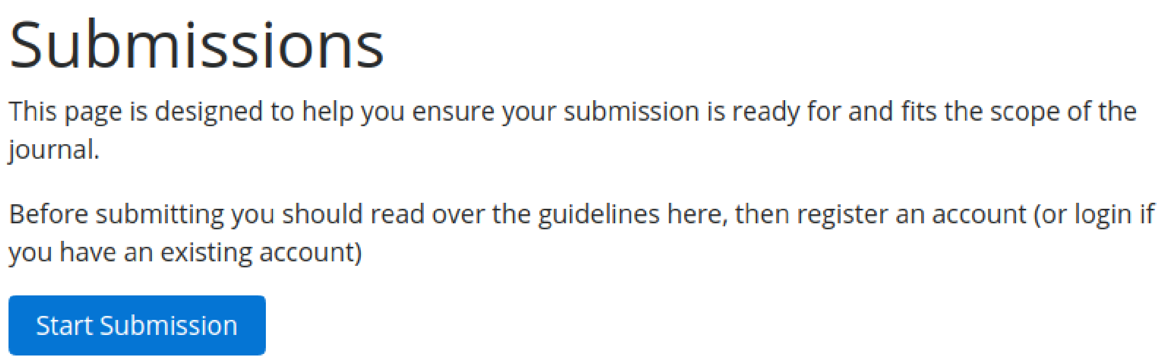


Fig. 2: Start Submission button on main Submission page

a Janeway journal. Generally all Janeway journals submission systems will look the same, along the top of the page you will see a timeline style bar that has 5 stages. You can use this bar to jump back and forward along the submission process if you need to make changes to an earlier screen. Once a stage has been completed it will turn into a link for you to click on (see image below).

2.1.3 The Author Agreement

The first page of a submission displays some author agreement text and various text areas for the you to complete. It should be noted that not all of the following fields may be displayed on the journal you are submitting to as they can be disabled individually.

- **Publication Fees**
  - This field will inform you of any publication fees and may list any APCs that apply to the submission.
- **Submission Checklist**
  - The Submission Checklist will display any steps you need to take before you submit your manuscript, this may be about the format of the paper.
- **Copyright Notice**
  - The Copyright Notice should tell you what licence the paper will be published under and any rights you may need to sign over to the publisher.
- **Competing Interests**
  - If you have any competing interests that the Editors should take into account when examining your paper.
- **Comments to the Editor**
  - If you have anything you'd like to tell the Editors, this field is like a Covering Letter.

If enabled the Publication Fees, Submission Checklist and Copyright notice fields will be required, that is to say you _must_ check the boxes in order to complete a submission. If you have any issues with any of the clauses it is suggested you get in touch with the editor to discuss them before proceeding.

2.1.4 Article Information

The Article Information page displays a form with a series of input boxes. This is where you will insert the majority of your paper's metadata including:

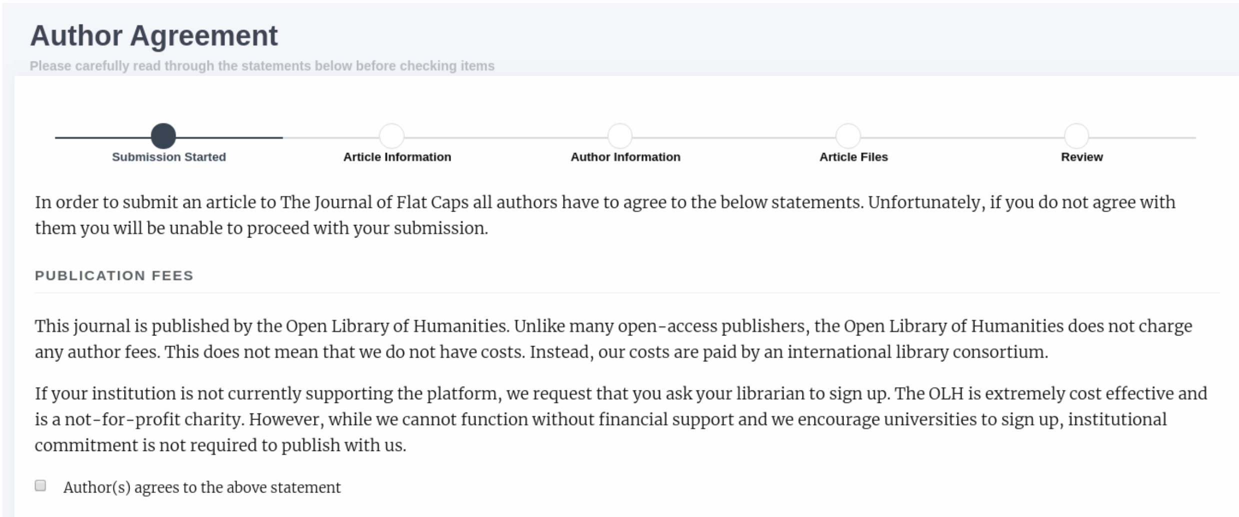


Fig. 3: Publication Fees displayed on an OLH journal Author Agreement page

- **Title**
  - This field is required on all Janeway journals
- Subtitle
- **Abstract**
  - Individual journals can make the abstract field required or not
- **Language**
  - The language option is usually disabled if the journal only accepts one language
- **Section**
  - Denotes what type of article the paper is (eg. Research, Review, Editorial etc.)
- **License**
  - The license option is usually disabled if the journal only accepts one license
- **Keywords**
  - Type your keyword and press enter and it will be turned into a box with an X icon, click the X icon if you want to remove the keyword. You can have multi word keywords (see keyword image below)

Individual journals can add more fields to this page and they will be displayed under a heading "Additional Fields"

2.1.5 Author Information

On the Author Information page we can add the authors of our paper. One some journals the submitting user is added as an author automatically, on others you will have the option to add yourself as an author using a button.

To add more authors we can either search the journal's author list or create a new author. Note that if you don't search first and use the Add New Author button to add an author who's email address is in the database this will not create a new record but add their existing record to your submission.

- **Search**

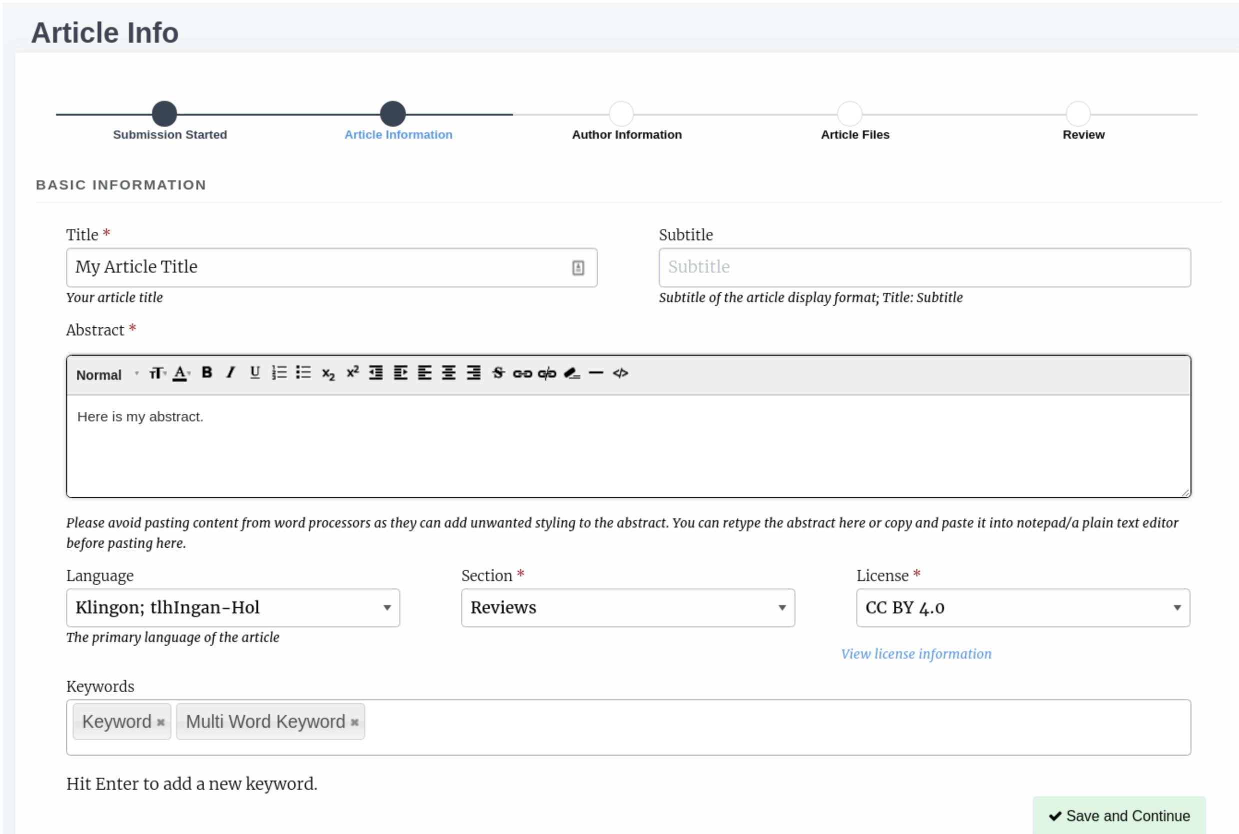


Fig. 4: The Article Information page filled with example data

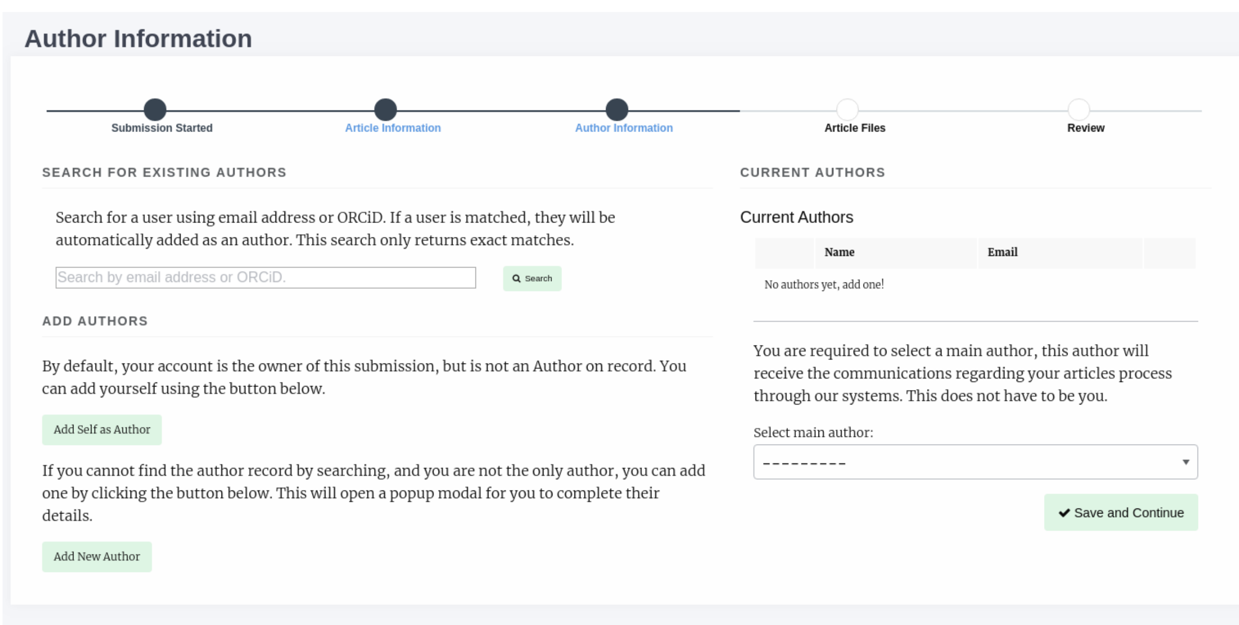


Fig. 5: In this example journal the submitting user has not been added as an author but can use the "Add self as author" button to add themselves

- You can search the journal's database of authors using email address or, even better ORCID. If a matching record is found they will be added as a co-author. If not, you will be notified that no account has been found.

- **Add Authors**
  - **You can use the Add New Author button to create a new author record for your co-authors if they don't have on**
    - First Name
    - Last Name
    - Institution (can be supplied as N/a or Independent for those who do not have one)
    - Email Address
  - An account will also be generated so that the co-author can log in to the journal to check the progress of the paper. They will need to use the Password Reset function to get access to their account.

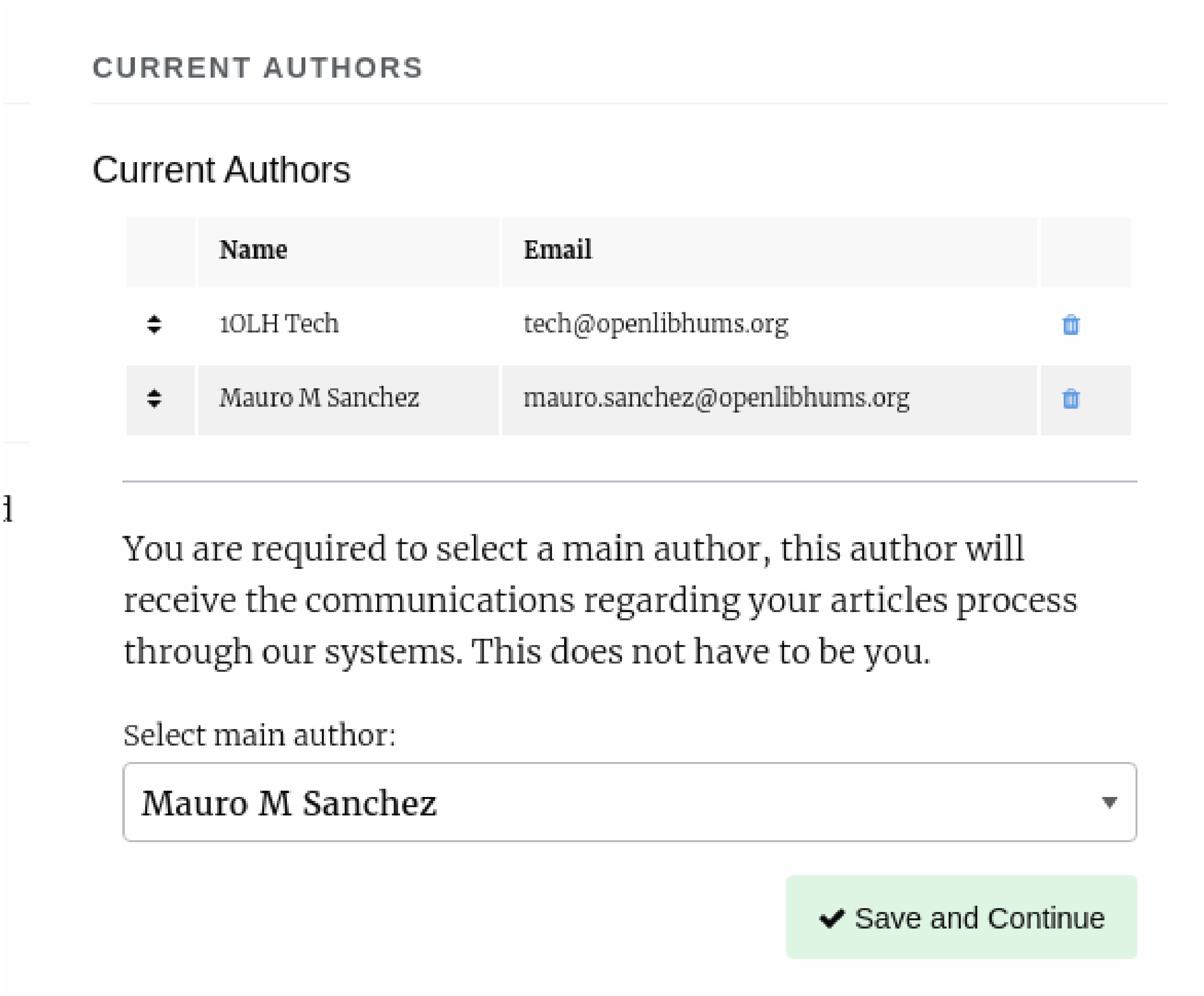


Fig. 6: There are now two authors added to the submission. You can use the trash icon to delete authors and the arrow handles to drag and drop to re-order the authors

2.1.6 Article Files

Here you can upload your manuscript and any figure or data files that go along with it.

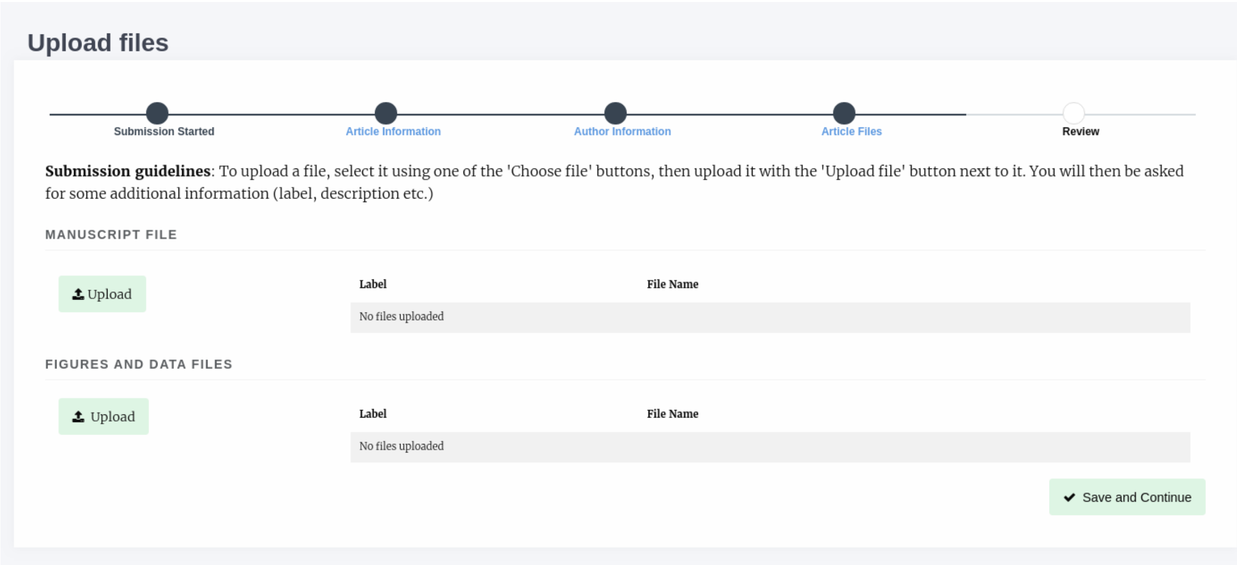


Fig. 7: You can upload your Manuscript and seperately any files that go along with your paper

Select one of the Upload buttons and a popup will appear, you can select the file using the "Choose file". You are required to add a label but the description field is optional.

You can only add one Manuscript file but can repeat the upload process for figures and date files. The label of figure files should match the image in the manuscript (figure 1, figure 2 etc).

2.1.7 Review

The review page displays a run down of the article you've submitted, metadata, files and authors. Once you have reviewed your submission you can complete or jump back to other stages to make changes.

2.1.8 Revisions

Editors may request that authors revise their files based on recommendations from reviewers. There are two types of Revision decision:

1. Minor Revisions.
2. Major Revisions.

With Major Revisions you may find that the Editor will send the paper for a second round of review once you have completed your revisions.

When an Editor request revisions there are two ways to start this process:

1. Click the link in the email sent to you.

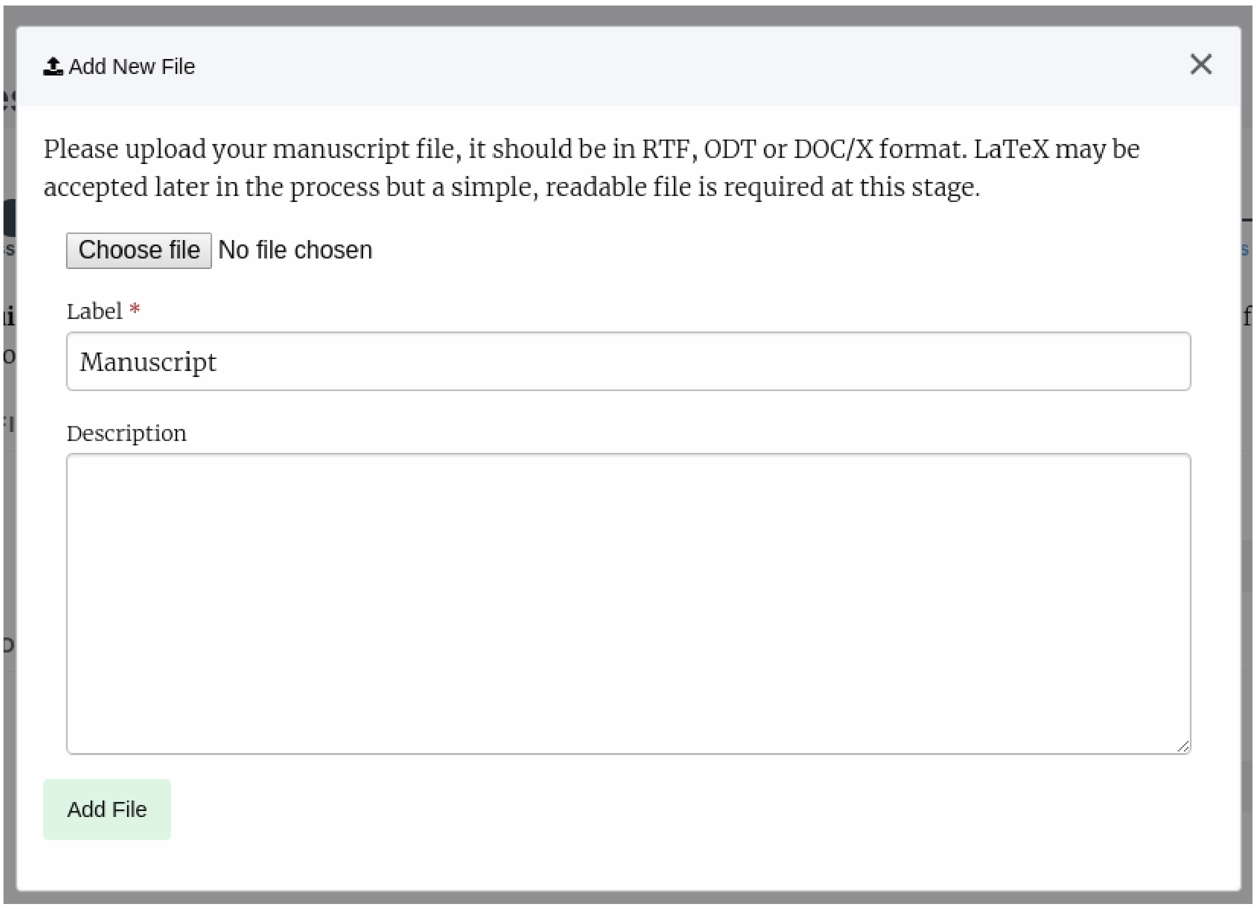


Fig. 8: Submitting a Manuscript file

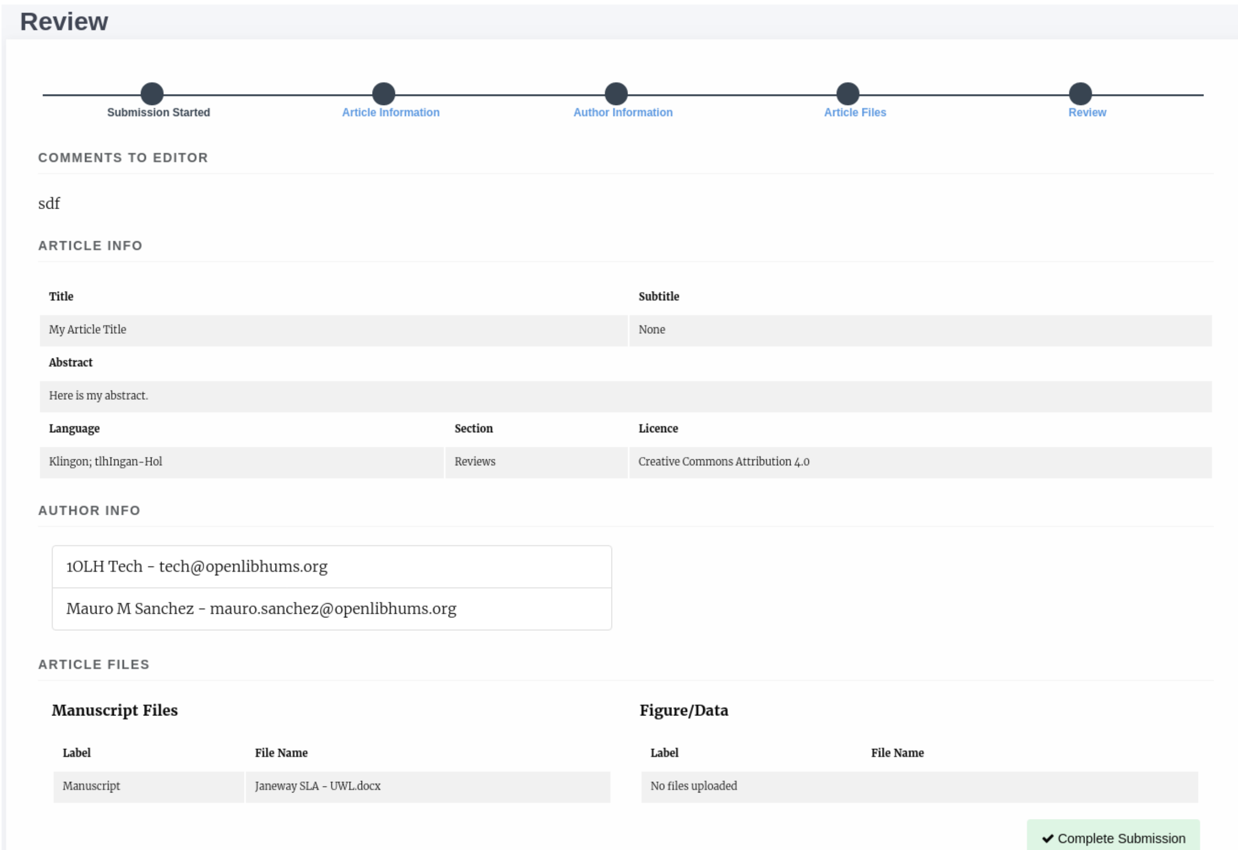


Fig. 9: The review page for the article

2. **Via the Journal Dashboard:**
    1. Login to the Journal
    2. Go to the journal Dashboard
    3. Scroll down to "Submitted Articles"
    4. Click the "Revision Request" button next to the article.

Once you have accessed the revision request you will be able to view available peer reviews and download, revise or upload new files. Once you've uploaded a revised manuscript and any additional image files you can fill in the covering letter and save the revision.

2.1.9 Copyediting

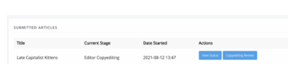
Editors and authors are encouraged to undertake as many rounds of copyediting as is necessary to ensure that the text is ready to go into production.

It is important that all stylistic changes are made at this stage. As many errors as possible should be corrected at this point, and by the end of copyediting there should be a final manuscript which requires no further changes. The typesetters will then use this final manuscript to create the finished article, which will be sent back for checking in the form of typeset proofs.

Typeset proofs are not an opportunity to make changes to the content or style of a manuscript: the file that goes into production is final. It is expected that only a handful (less than 10) of very minor changes should be requested at the proofing stage, if any.

When an Editor requests an Author Revision following a copyedit:

1. Click the link in the email sent to you to access the file.
2. **Alternatively, to access this via the Journal Dashboard:**
    1. Login to the Journal
    2. Go to the Journal Dashboard
    3. Scroll down to "Submitted Articles"
    4. Click the "Copyediting Review" button next to the article



Once you have accessed the Copyediting Review request you will be able to view requested copyedits and download the copyedited file. Copyedits are made as tracked changes.

Please accept all tracked changes you agree with and address any queries the copyeditor has made in the comments. Check your manuscript carefully to ensure you have not introduced any new errors before uploading your revised file back into the system.

To complete a Copyediting Review:

1. Upload your revisions to the copyedited manuscript. You can do so by replacing the copyeditor's version of the file with your own updated version.

2. Fill in the Note to the Editor with any additional information
3. Select a Decision (either 'Accept' or 'Corrections Required')
4. Click 'Complete Copyedit Task'

2.1.10 Proofing

After your paper has been accepted and copyediting, the editors might send you a request to proof the 'Typesetting Files'. These files are the final finals that will be made publicly available once the article gets published on the journal.

For journals that publish content in multiple media formats (HTML, PDF, XML. . .) It is important that you check all these files before publication. Authors are not expected to be able to open and read XML/HTML code. Instead, Janeway provides a 'preview' button were you will be able to previsualise the article as it will be rendered once it gets published.

Once you've previewed the files, you can provide feedback in two ways:

1. Fill in the rich-text "Notes" box. This form element supports rich-text as well as pasting in screenshots or other types of images

2. Upload an annotated file. In the case of PDF files, you can download the file and make annotations offline using specialized software. when this is done, you can upload the annotated file for the editor to review.

It is important to proof all the files thoroughly in order to avoid unnecessary follow-up rounds that will potentially cost more time and money to the journal's editorial team and publishers.

Once you have provded your feedback, it is possible that the editorial team might send you another proofing tasks once the requested corrections have been applied. In that case, the process to follow is the same as explained above.

2.2 Editor Guide

2.2.1 Review

2.2.1.1 Unassigned Article

Once an Author has submitted an article it is the Editor's turn to review the unassigned article, assign an Editor and move it into the review process. An Editor will be notified once an article is submitted, the email will contain a link, or the Editor can access the article from the Dashboard page.

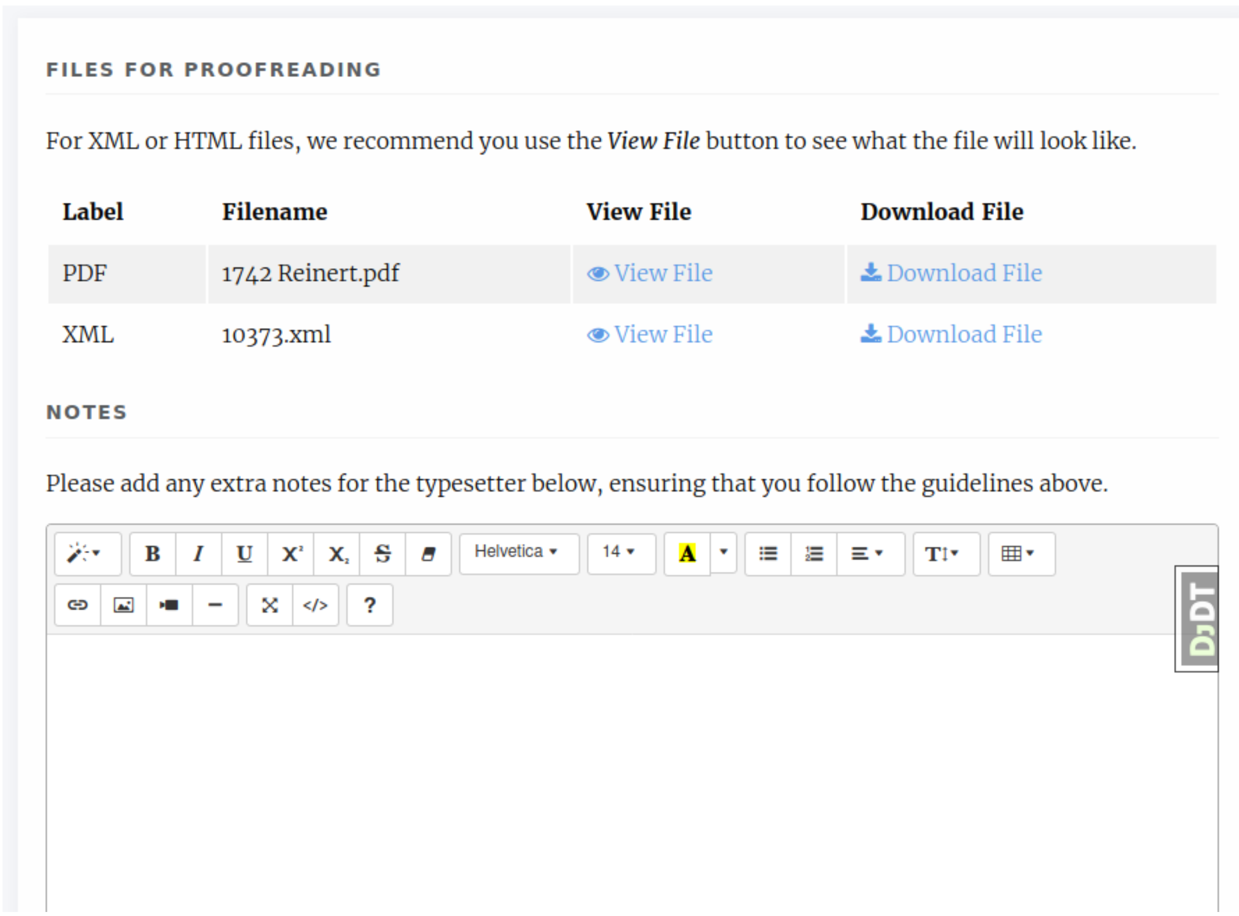


Fig. 10: Typeset Files download and preview

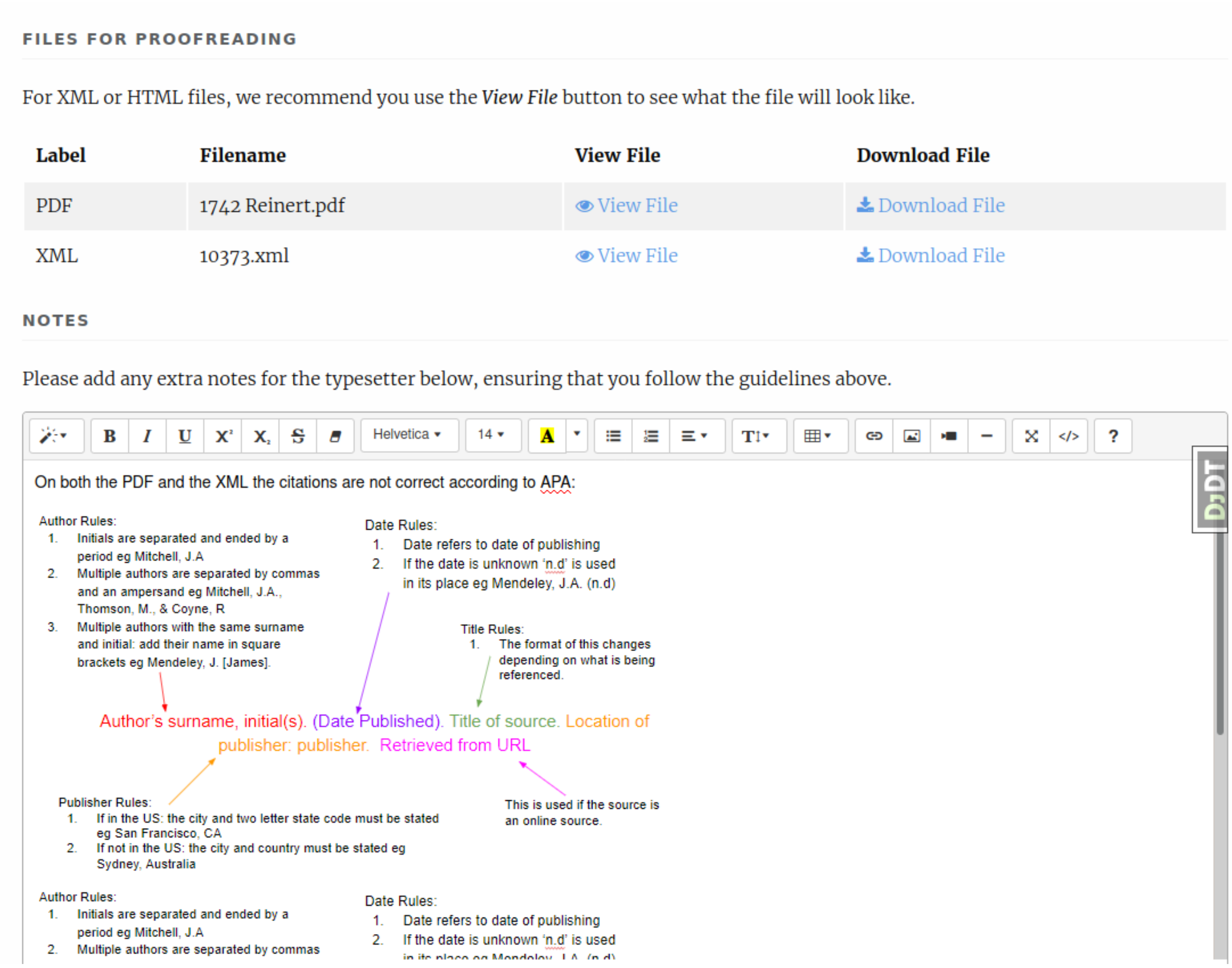


Fig. 11: Providing proofreading notes via Rich-text editor

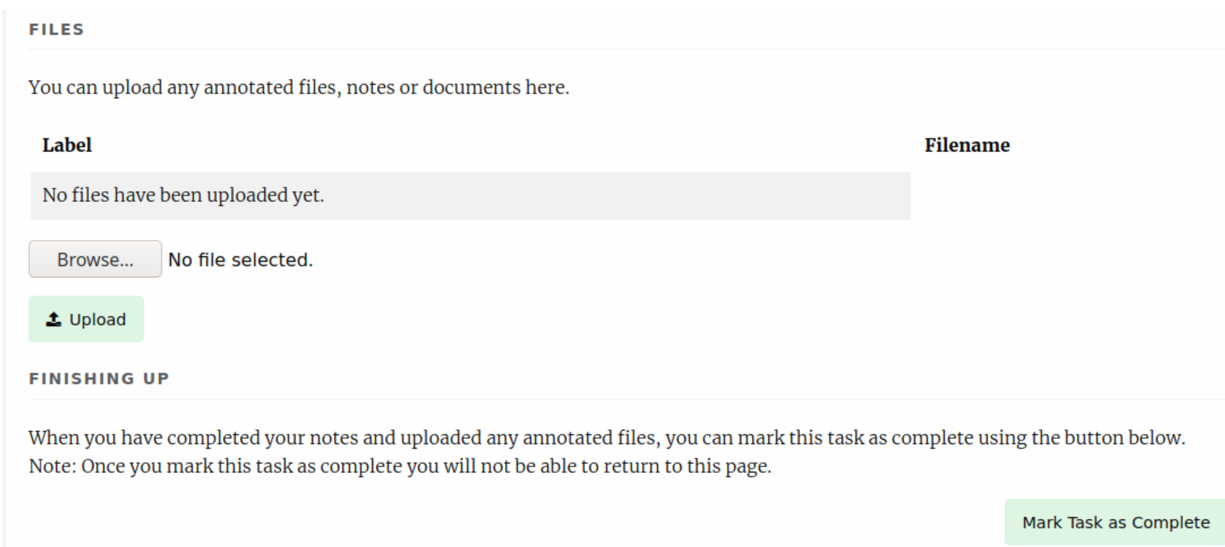


Fig. 12: Providing proofreading notes by uploading an annotated file.

Selecting Unassigned will provide the Editor with a list of articles that haven't yet been assigned an Editor and moved into review. You can view the data for an article by selecting "View". On the left hand of the page all of the article's metadata will be listed, on the right, its options and actions.

The first thing an Editor needs to do is assign an Editor or Section Editor to the handle the article through the journal workflow. Once assigned, the Editor can then do one of the following:

1. Move the article to review
2. Reject the article outright
3. Accept the article outright

Rejecting will allow you to tell the author why, Accepting will move it into Copyediting (if you have the default workflow) and Moving to Review will move the article into the Review workflow.

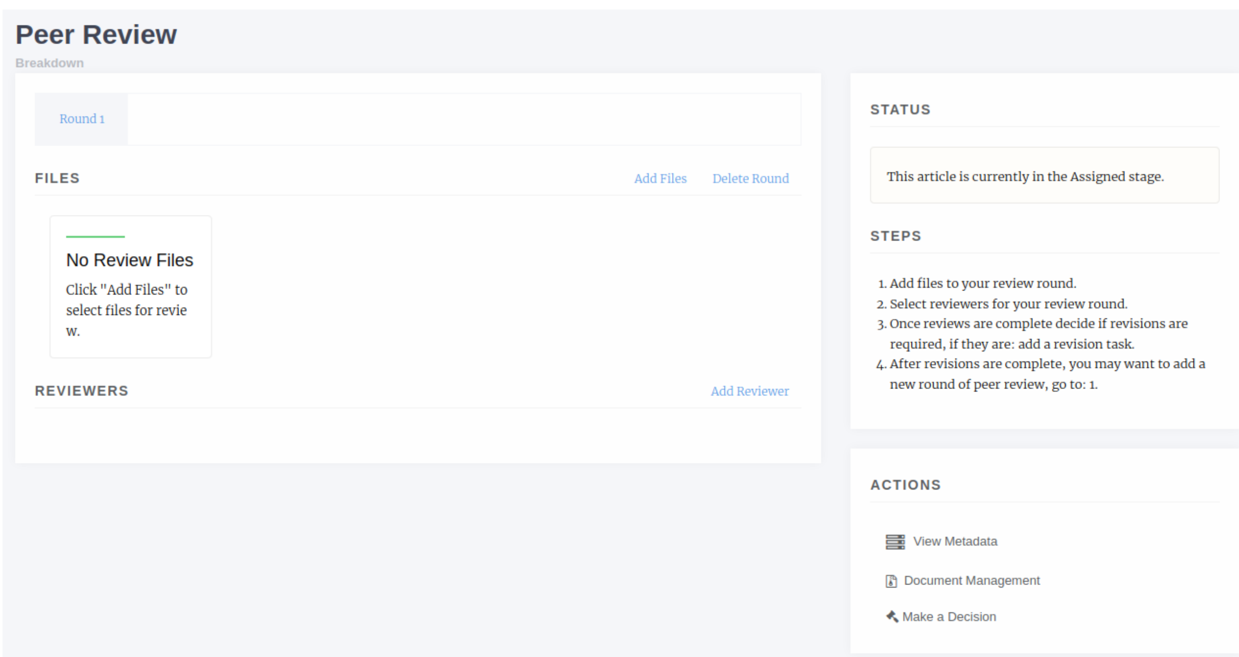
If you move the article into review and are the author of an article you will be blocked by a permission denied page.

If you opt to over-ride the security warning, all other Editors will be notified of this.

2.2.1.2 Review Page

The review page presets various actions:

1. Add Files
2. Delete Round
3. Add Reviewer
4. New Review Round
5. Request Revisions



2.2.1.3 Add Files

The Add Files options allows you to list which files will be listed for the reviewers in the current review round. All reviewers for a given round will see the same files. You will also be asked to confirm that the files you've selected have been checked to ensure there is no identifying author information in them. If there are you can download, edit and replace the version in the system on this screen.

2.2.1.4 Delete Round

This is an end all button, it will remove the files and reviewers from the current round. You will be given a prompt that explains what will be deleted if you agree, **NB**. **there is no way to recover a review assignment once it is deleted so only use this option if you really want to remove it, better to add a new round which will close all open review assignments.**

2.2.1.5 Add Reviewer

When adding a reviewer you have two options, you can select a reviewer and go through the process of setting up their review (visibility, form and due date) or, if you've setup the required defaults, you can "Assign with Defaults". This will use the default type, visibility, form and due date for your journal and send an automated email to the reviewer (the former allows you to edit the email).

Assuming you choose to select the options yourself, when you press "Add Reviewer" you will be taken to the "Notify" page where you can edit the outgoing email to the user. There is an option available to skip sending this email if you wish.

Once the reviewer is assigned they will be able to access the system and let you know if they will complete the review and, if yes, access the review form you specified.

2.2.1.6 Making Reviews Available to Authors

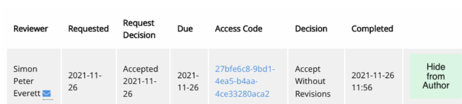
Once a round of Peer Review is complete, you can choose whether to 'Hide' or 'Make Visible' the different elements of the review from authors.

Allow Author to See

Click through to 'View' a completed review:

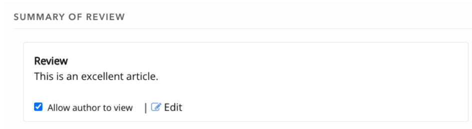
The first "Allow Author to See" button pertains to the review assignment itself. If this says 'Allow Author to See', the author cannot currently see this report.

If this button reads 'Hide from Author', the author can see the report.



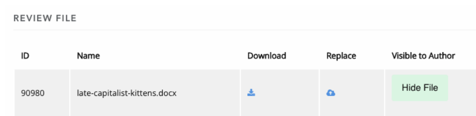
Reviewer	Requested	Request Decision	Due	Access Code	Decision	Completed	
Simon Peter Everett	2021-11-26	Accepted 2021-11-26	2021-11-26	27bfe6c8-9bd1-4ea5-b4aa-4ce33280aca2	Accept Without Revisions	2021-11-26 11:56	Hide from Author

The "Allow Author to See" checkbox pertains to the 'Summary of Review' field or individual elements of the review form, if enabled. The default here is "Allow Author to See". If this box is checked, the author can see review text input into Janeway. If this field has been changed by an editor, the author only sees the edited version (but editors can see both versions on their screen). If this box is unchecked, the author cannot see the review text (if a review form with multiple elements, editors can check some and uncheck others on a per-field basis).

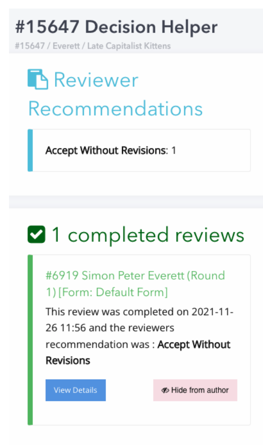


If you make a change to the Summary of Review visibility options, click 'Update Individual View Options' to save.

The third "Allow Author to See" button pertains to a review file, if uploaded. The default here is "Hide from Author". If this button appears as 'Allow Author to View File', the author cannot currently see the review file. Note: the editor must check and anonymise this file before making available to the author if working on a blinded basis. If this button reads "Hide File", the author can see the review file.



Once you have adjusted the visibility of Peer Review reports, and have clicked through to 'Make a Decision', you will see a summary of the Peer Reviews and what is and what is not revealed to authors before sending your Decision.



2.2.1.7 Decision Helper

> **Warning:** As of version 1.3.10 all review decisions have been moved to the Decision Helper page.

One of the options under Actions is "Make a Decision" this will take you to the Decision Helper page. Once on this page you will see a summary of reviewer recommendations, their review form answers and a list of uncompleted reviews. The decisions available from this screen are:

- **Accept Article**
  - Accepts the article, allows you to email the author and moves the article into the next stage.
- **New Review Round**
  - This option adds a new review round, a clean slate of review! Any open review assignments on the current round are withdrawn and a new round is set up. This process is often done after round 1 is complete and the author has also completed some form of revisions. You will still be able to see Round 1 via a tab at the top of the page.

- **Reject Article**
  - Rejects the article, removes it from the workflow and allows you to email the author.
- **Request Revisions**
  - Allows you to request the author revise their paper.
- **If enabled, Draft a Decision**
  - Allows Section Editors to draft one of the above decisions for approval by an Editor.

2.2.1.8 Request Revisions

Tip: Before requesting revisions make sure you have marked reviews as available to the author. The Request Revisions page will warn you if you have not done this for a given review.

Requesting revisions will allow you to ask the Author to make changes to the manuscript, this may be for editorial reasons or as the result of a round of peer review. Usually the process would be:

1. **Review Round 1**
   1. Reviewer 1
   2. Reviewer 2
2. Accept/Decline/Revisions based on reviewer feedback
3. Request Revisions
4. **Review Round 2**
   1. Reviewer 3
   2. Reviewer 4
5. Action based on reviewer feedback

2.2.1.9 Draft a Decision

Draft Decisions (DD) is an optional workflow that requests that Section Editors submit a draft of their editorial decision for approval by an Editor before it is sent to the author via the system. When enabled, a Section Editor will only see the Draft Decision feature on the Decision Helper page.

Section Editors:

1. Go to the Decision Helper page.
2. Select Draft Decision.
3. Complete the form, following the onscreen instructions.

Editors:

1. Will be notified when a Draft Decision is made.
2. Open the link in email.
3. Review the draft.
4. Edit, Accept or Decline the Draft.

5. If accepted the decision event will fire.

Examples of Draft Decisions are: Accept, Minor Revisions, Major Revisions or Decline. Editors are required to approve these Draft Decisions (DD) before they are sent to Authors.

If the DD is Accept, an article is moved into Copyediting.

If the DD is Minor Revisions, the Section Editor should provide the Author with guidance on how to implement the feedback from the Peer Reviewers.

If the DD is Major Revisions, the Section Editor should provide the Author with guidance on how to implement the feedback from the Peer Reviewers. If an article requires Major Revisions, then another round of Peer Review must be undertaken once the Major Revisions are complete.

If the DD is Decline, the article will be archived and the author notified.

To approve a DD:

1. Click on the link in the email notifying you of the DD
2. Click 'Edit' in the 'Existing Draft Decisions' box on the upper right hand side of the screen (NB do not start filling in the 'Draft Decision' form – your Section Editor will already have drafted an email to the author in 'Existing Draft Decisions)
3. Review the email to the Author and the Peer Review reports. Helpful Tip: You can open the 'Reviews' tab for the article in a separate window to compare the Peer Review Reports with the DD
4. Click 'Approve' to action the DD

2.2.1.10 Managing a Review

Once you have added a review to your round, it will be listed on the review page. The initial stage of any review is "Awaiting acknowledgement" which means we are waiting on the reviewer accepting or declining to undertake the review. At this stage we can:

1. View the review, though it doesn't tell us much
2. Withdraw the review
3. Delete the review
4. If the review is withdrawn or declined by the reviewer we can use a new option Reset to set it back to Awaiting Acknowledgement

2.2.1.11 An Example Review Round

Here is an example of a review round.

1. Add Files for Round 1.
2. Add Reviewer A to Round 1.
3. Add Reviewer B to Round 1.
4. Add Reviewer N to Round 1.
5. Wait for responses from Reviewers (Editor will be notified by email when Reviewer makes an action).
6. **When responses are back: Make a Decision (Accept, Decline or Request Revisions).**
    1. If Draft Decision is enabled and you are a Section Editor you will be asked to Draft a Decision for a Senior Editor to approve.

    2. Accept will move the article to the next stage.
    3. Reject will remove the article from the workflow.
    4. Request Revisions will allow the author to see any reviews that have been marked for their consumption and revise their manuscript.

7. **If Revisions were requested and another round of review is required:**
    1. Start a new Review Round.
    2. Go to the start.

2.2.1.12 Finishing Up

When in the standard workflow, after Review comes Copyediting.

To complete the Review stage you can select one of either:

1. Accept Article, moves the article into the next stage.
2. Decline Article, removes the paper from the workflow.

2.2.2 Copyediting

The copyediting stage provides an interface to track copyediting requests.

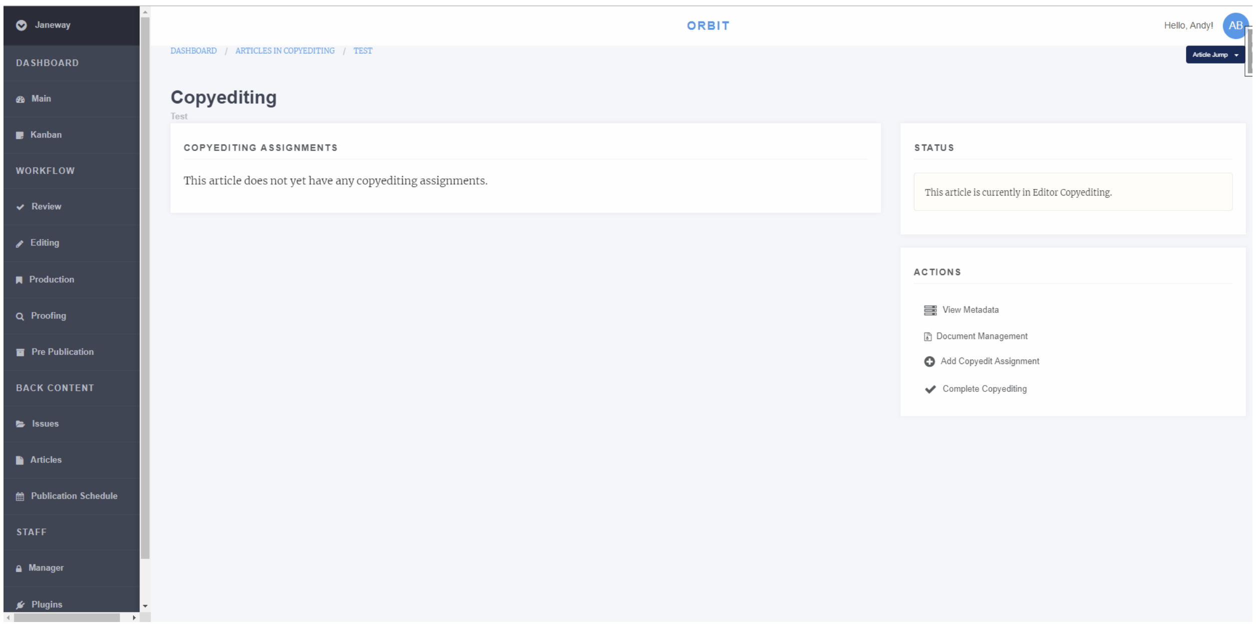


Fig. 13: Janeway's Copyediting screen

2.2.2.1 Assigning a Copyeditor

To assign a copyeditor select *Add a Copyedit Assignment*. This will present a screen with the following options:

1. **Select a Copyeditor** 1.1 You can either select a copyeditor from the list or enrol another user the role before selecting them.

2. **Select Files** 2.1 Select files will list manuscript files from the review stage including any new files uploaded as part of the revision process. 2.2 If the file you want is not here, go back to the Copyediting screen and use Document Management to upload it.

3. **Set Options** 3.1 A notes field is available for you brief the copyeditor. 3.2 A due date field with date selector allows you to set the date this assignment is needed by.

4. **Notify the Copyeditor** 4.1 Once you have clicked *Add Copyeditor* you will be directed to the Notification page where you can email the copyeditor if you whish, or skip if you don't.

2.2.2.2 Managing Copyediting Assignments

You can make as many copyediting assignments as you like and track them from the copyediting screen.

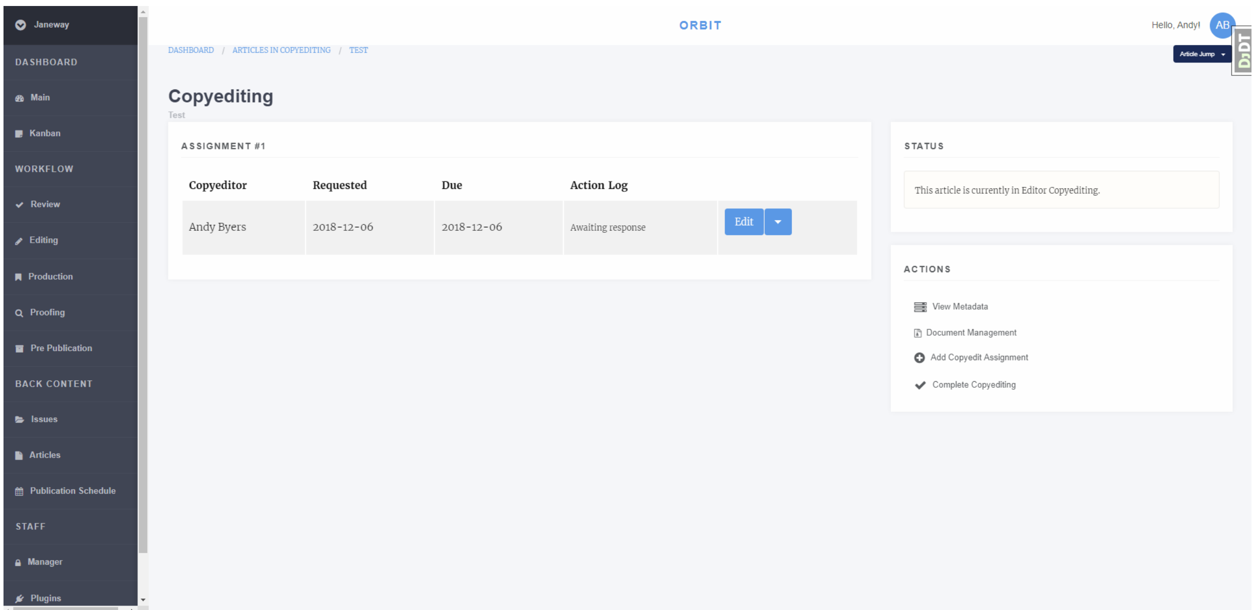


Fig. 14: Janeway's Copyediting screen with an assignment

After an assignment has been made the copyeditor will be able to login to the system to do their work. Before the task is accepted you have the opportunity to edit the notes and due date or delete the assignment, once the copyeditor has accepted the task these options are removed and replaced with a *Review* button. The *Action Log* will also updated with relevant dates like *Copyeditor accepted the request*.

2.2.2.3 Review Copyediting

The review page presents the response from the copyeditor including their notes and any files they uploaded. You can now do one of three things:

1. Accept Copyedit, this closes the task.
2. Request Author Review, ask the author to review the copyedits.
3. Reopen the task, ask the copyeditor to make some changes.

Accepting the copyedit closes this task, if you wish to make further requests from the copyeditor after pressing this you can assign the copyeditor again to a new task.

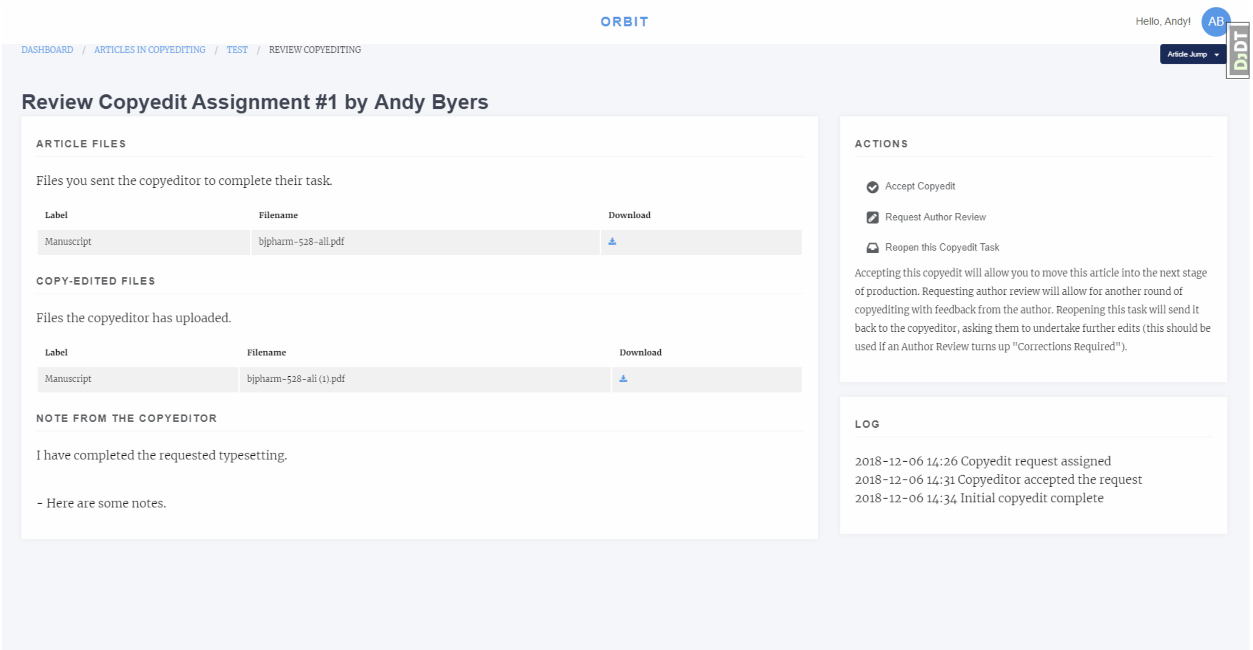


Fig. 15: Copyediting review page

Requesting author review will ask the author to review the changes made and inform the editor if any corrections are required. The author can also upload a file if they have made corrections or used track changes.

Reopen the task asks the copyeditor to make further changes to the manuscript file. This is most often used after a Author Review returns *corrections required*.

2.2.2.4 Finishing Up

When you are finished copyediting the manuscript you can select *Completed Copyediting* to move to the next stage. In the standard workflow the next stage is Production.

2.2.3 Production

Janeway allows for the use of Production Managers. These may be users who handle the production or articles, external organisations, or publishers. Their job is to assign typesetters and/or create galley proof files.

For smaller organisations that do not utilise an external production team, the Editor can assign themselves as Production Manager, this will allow them to upload galley proofs or assign other users as typesetters for the article. If you are assigning an external production manager, you will still have access to the Production Management screen.

2.2.3.1 Assign a Production Manager

Select either:

1. **Assign production manager** 1.1 Select a production manager from the lsit
2. **Assign self** 2.1 This will make you the Production Manager

After assignment the article will move from Awaiting Assignment to In Progress, if you assigned yourself it will also show in Assigned to Me.

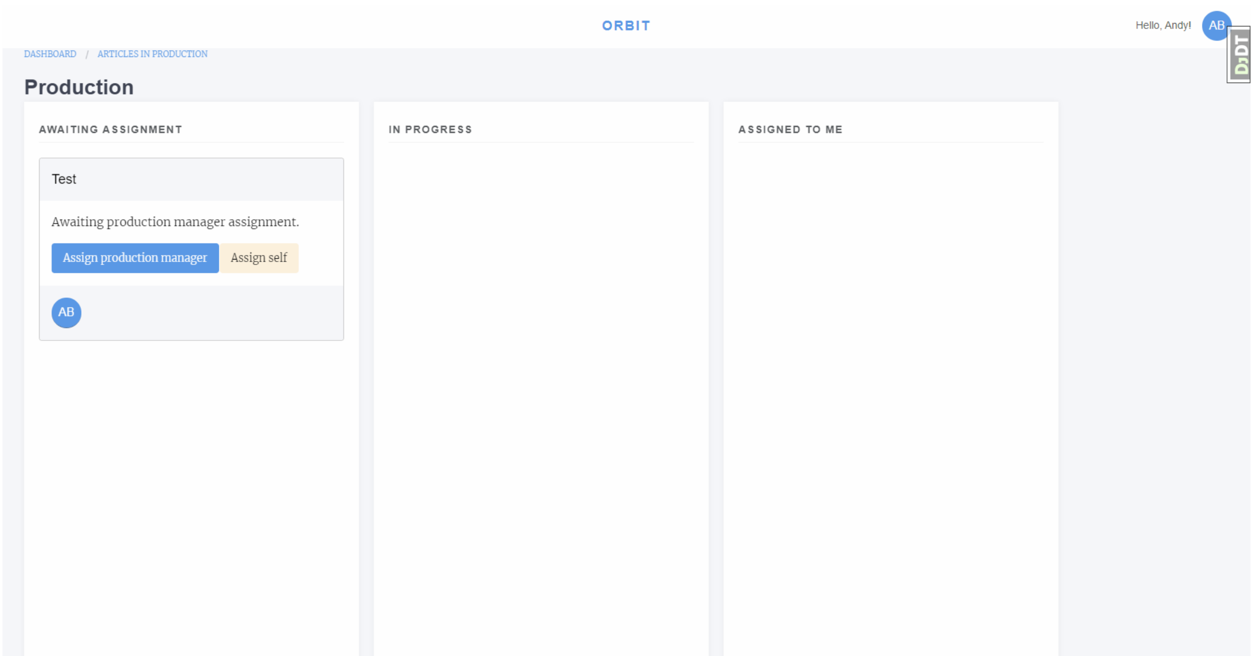


Fig. 16: Production Manager assignment interface

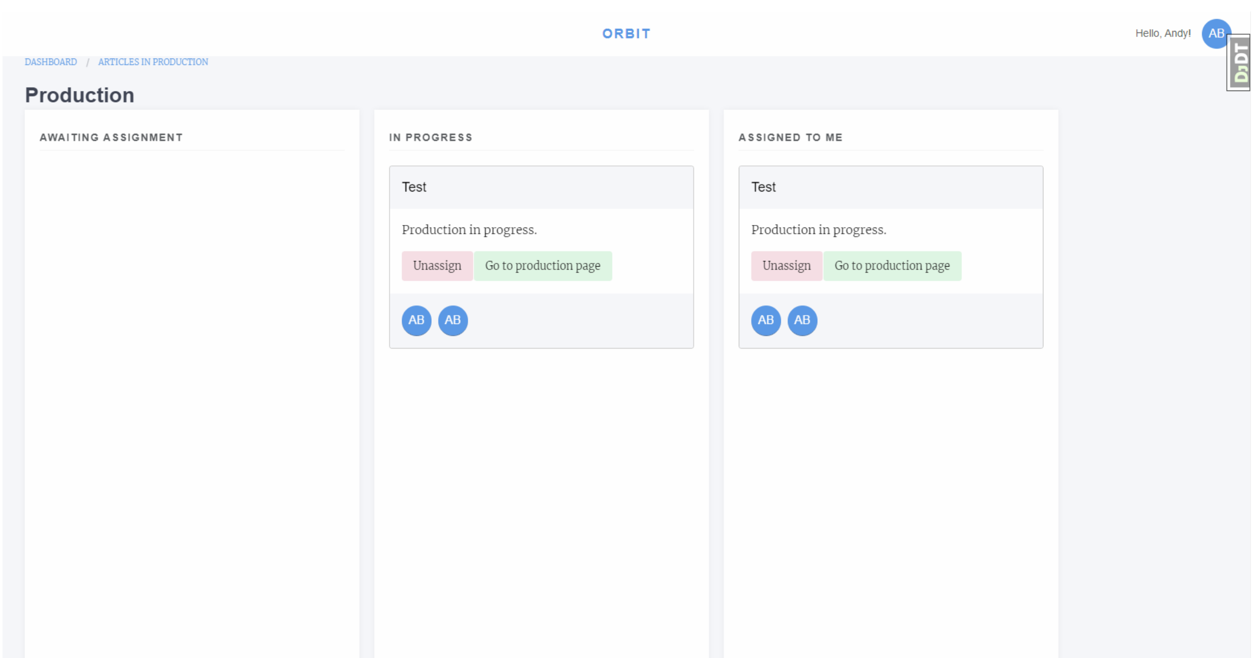


Fig. 17: Production Manager with assigned article

2.2.3.2 Production Screen

From the production screen the Production Manager can:

- Assign typesetters
- Upload galley proofs
- Upload supplementary files and assign them DOIs

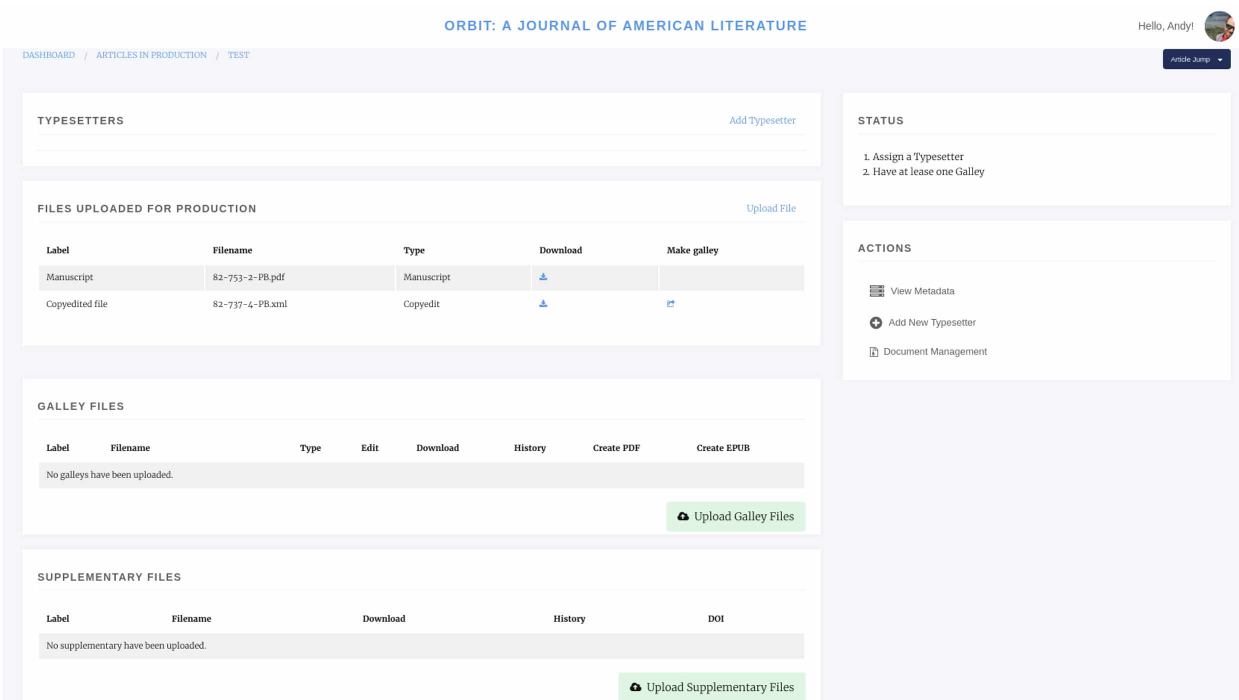


Fig. 18: Production Manager screen

2.2.3.3 Assigning a Typesetter

To assign a typesetter first select *Add Typesetter*.

1. Select a Typesetter
2. Select the files you would like this typesetter to work on
3. Add any notes like what outputs you would like
4. You have the option to send a notification email

Note, you can add as many typesetter assignments as you like.

2.2.3.4 Uploading Galleys

Galley files are used for proofing and for displaying content on the live site. Janeway can display either JATS XML or HTML galleys and list most other formats as downloads.

To upload a galley click *Upload Galley Files*. You can then select either XML/HTML, PDF or Other.

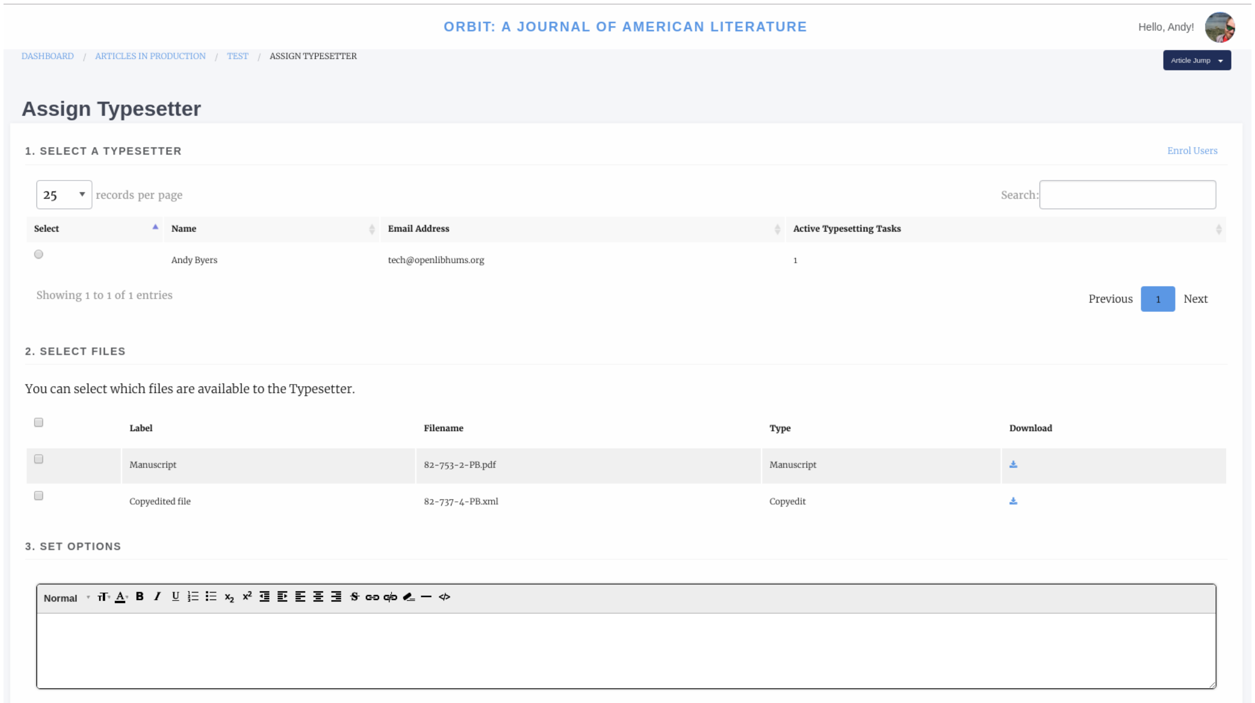


Fig. 19: Assigning a typesetter

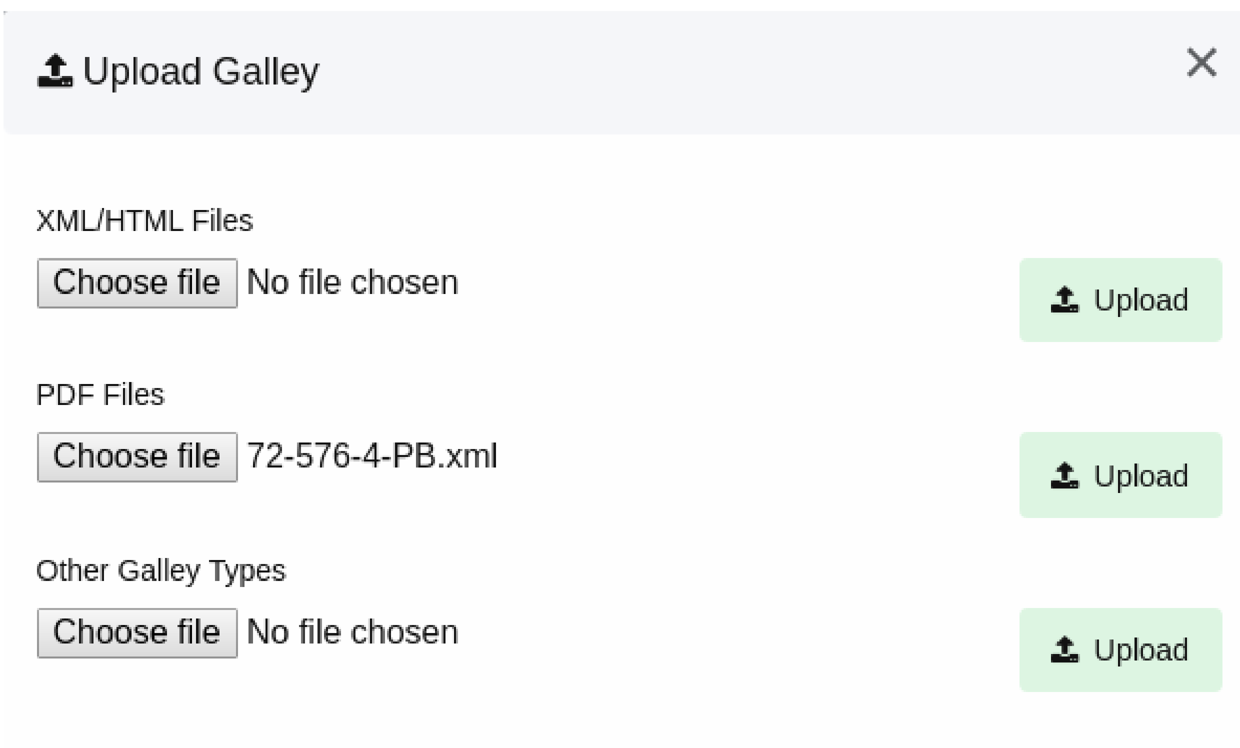


Fig. 20: Uploading a galley file

When uploading an HTML or XML file, with images Janeway will warn you that you need to upload them with a message like "Missing supplementary files."

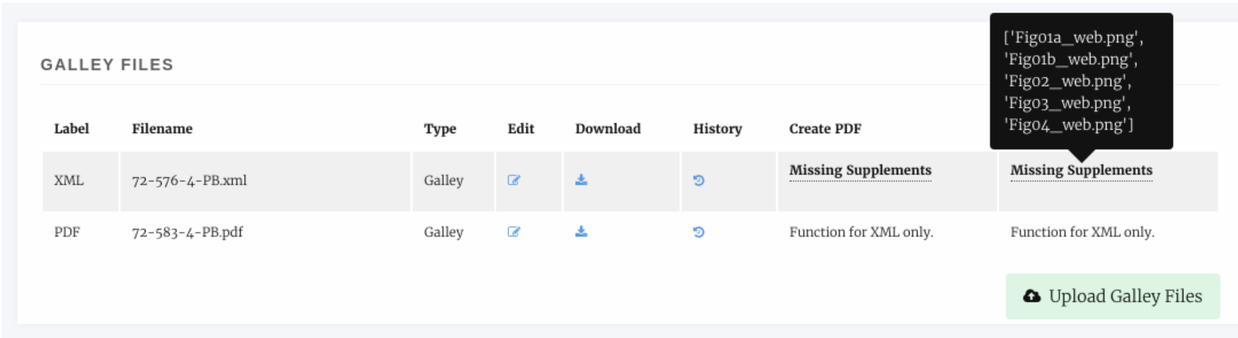


Fig. 21: Missing Image files

We can upload these by selecting Edit Galley and using the upload boxes to upload the image files.

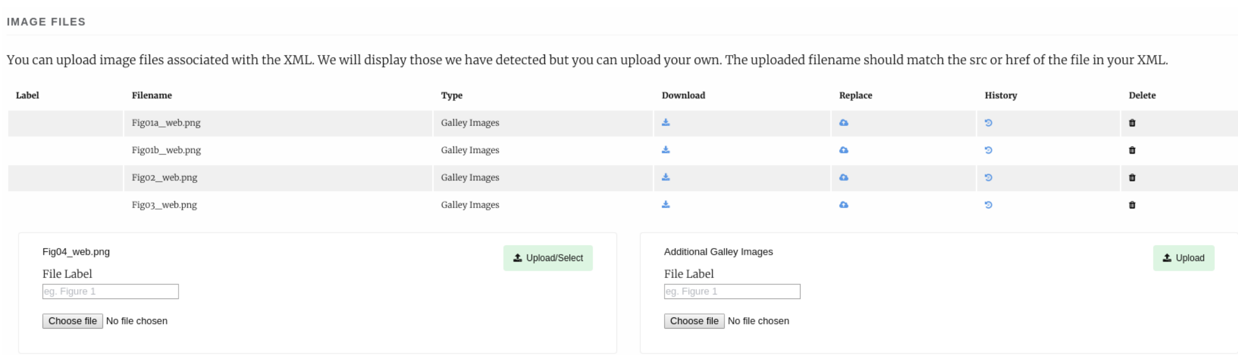


Fig. 22: Uploading image files

On the edit galley page we can also replace the galley file, edit its label and upload an accompanying CSS file if the article requires specific styling.

2.2.3.5 Finishing Up

Once either the typesetters have completed their task or you have uploaded the Galleys yourself we can complete the production stage. If in the event you require the typesetter to do some additional work on the galleys you can assign them again once their initial task is complete.

To complete the Production stage select *Mark production as complete* and optionally send an email to the editor (if you are the editor you can click skip to not send the email).

2.2.4 Proofing

The Proofing stage allows us to request proofreading from any of:

- The journal editors
- Users with the proofreader role
- Authors of the article

Much like Production we can assign a Proofing Manager to undertake the proofing stage on the Editors behalf or we can assign ourselves as the proofing manager. Either way Editors retain access to the Proofing Manager pages.

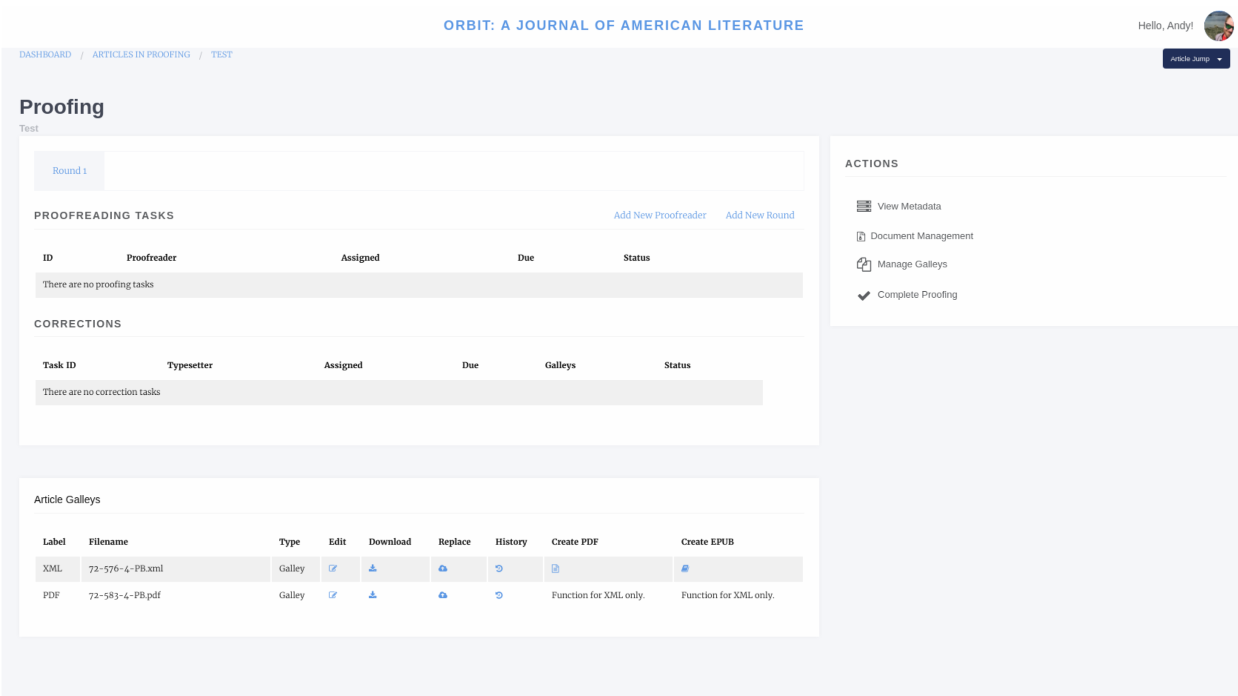


Fig. 23: Proofing manager screen

From this page we can assign proofreaders and upload new Galley files. To add a new Proofreader select Add New Proofreader.

2.2.4.1 Assigning a Proofreader

1. Select the files we want the proofreader to view. XML will be rendered into HTML and PDFs and EPUBs will be displayed in the browser. All other file types will be served as downloads.

2. Select the proofreader. The list of potential proofreaders is made up of Editors, Users with the Proofreader role and the Authors of the paper. You can only select one proofreader but can add multiple assignments.

3. Task, you can use this text box to define the task for the proofreader eg. Please undertake a technical reading of theses galleys.

4. Due Date allows you to set a date for the task to be complete, please ensure you give people a reasonable amount of time to complete the task.

After completing this for you can optionally send an email to the proofreader with information about their task.

2.2.4.2 Editing a Proofing Assignment

Before a proofing assignment has been accepted and is underway you will have the option to edit it using the *Actions* drop down. The edit interface allows you to change the galleys, task box and the due date of an assignment. It also has a delete button that will completely remove the assignment, though some information is retained in Janeway's logs.

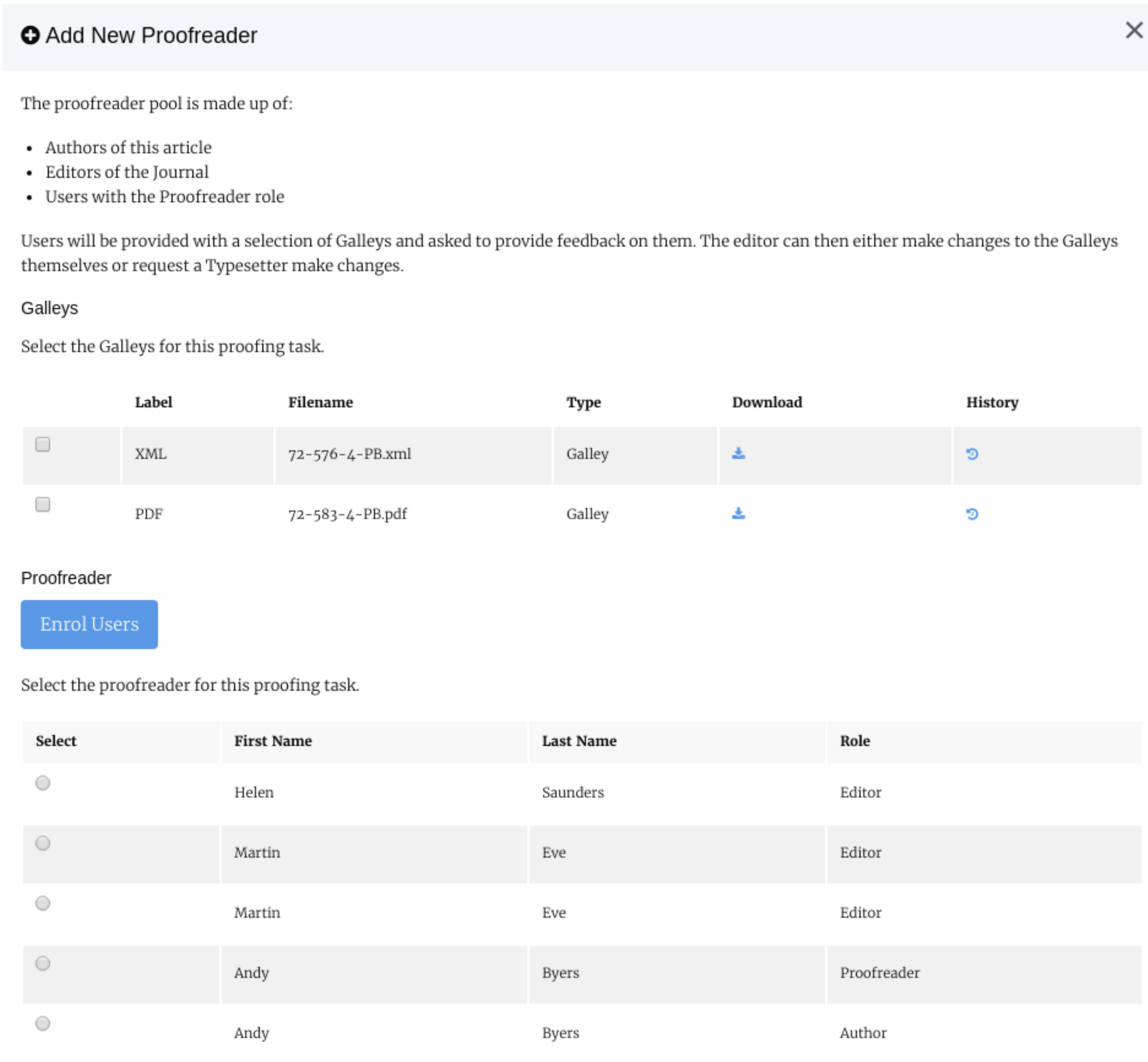


Fig. 24: Adding a proofreader part 1

Fig. 25: Adding a proofreader part 2

2.2.4.3 Completed Proofing Assignments

Once a proofing assignment is completed, the *Actions* drop down is populated with three different buttons:

1. Review
2. Request changes
3. Acknowledge

Review

The review page will display each of the assigned galleys and allow you to view the notes the proofreader made about the paper. You can also add your own notes here if you have further things to add (this is useful if you are using an external typesetter). If the proofreader uploaded a annotated document you can also view it on this page.

If you are using external typesetters or have someone using the typesetting role, you can then request changes from them using the *Request Changes* button on this page, or from the action menu on the main Proofing screen.

Request Changes

You can use this page to request changes from a typesetter. The first thing to do is decide if you want to pull the proofreaders comments into the task box. If you do, press the *Import Comments* button in the top right of the page. You can then:

1. Edit the task
2. Set a due date
3. Select proofed galleys for editing
4. Select a file the proofreader uploaded (if any)
5. Select a typesetter

As always you will have the option of emailing the typesetter.

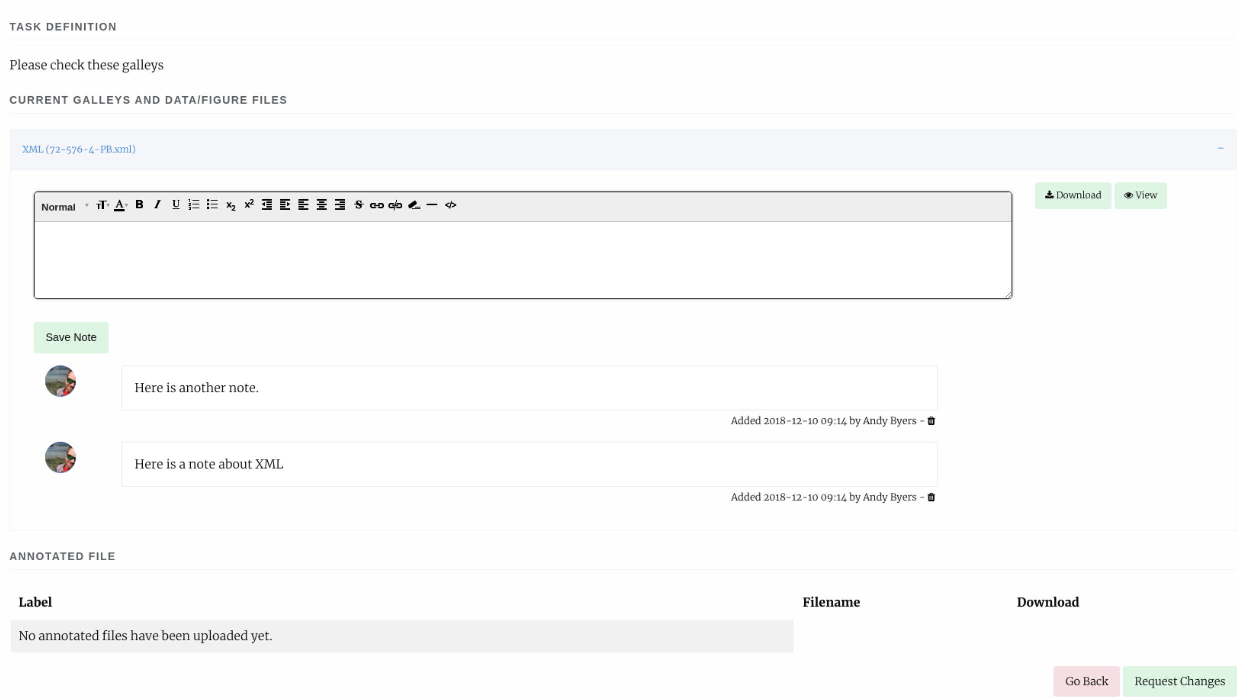


Fig. 26: Reviewing a proofing task

Acknowledge

Allows you to send a short thank you message to the proofreader acknowledging their work.

Corrections wihout Typesetter

If you are not using a typesetter but are making corrections yourself the main Proofing interface provides a place to replace existing galleys with new versions or to upload new files.

2.2.4.4 Finishing Up

Once you are happy with the galley files you can complete the proofing stage. This will move you to the pre-publication page.

2.2.5 Typesetting (Plugin)

The typesetting plugin is a new workflow element introduced with the release of Janeway v1.3.8 This new element aims to simplify the production process by combining the generation of the final article files (Refered to as 'typeset files') with the process of proofing such files.

Usually typeset files include but are not limited to:

- A PDF file
- An HTML file
- An XML file such as JATS-XML (Janeway can render JATS-XML files on the website as HTML with the use of XSLT)

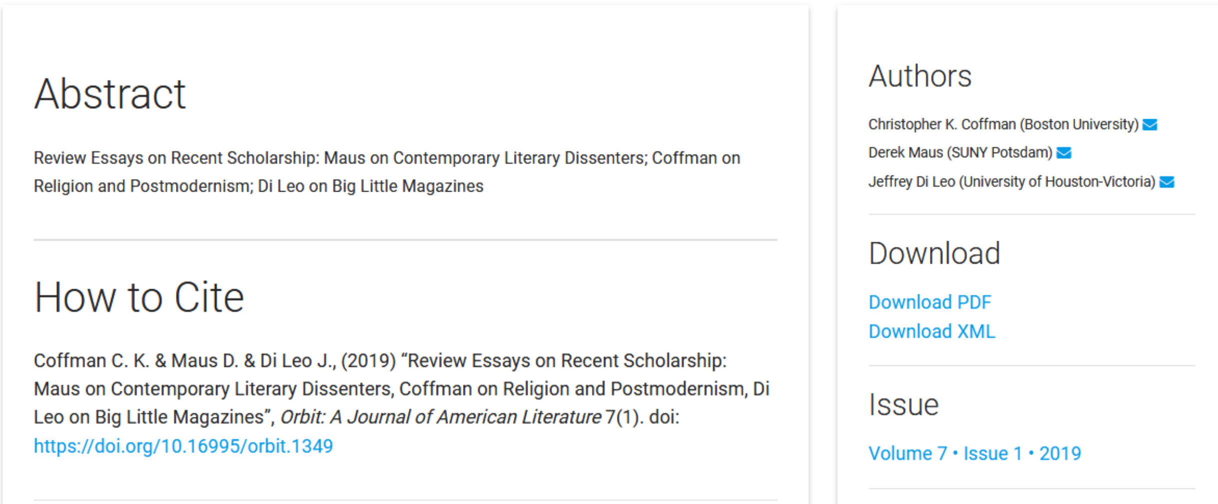


Fig. 27: Detail of a published article, showing the option to download the Tyepset files

All the typeset files will be available to be rendered or downloaded from the article page once your article is published.

To get started with the typesetting plugin, contact your site administrator. You can find more details on GitHub.

In a future release of Janeway, Typesetting will replace the Production and Proofing workflow elements.

2.2.5.1 The Typeseting plugin dashboard

When the typesetting plugin is installed and enabled as part of the workflow of a journal, every user will get a typesetting card on their dashboard. These card, will show different buttons depending on the roles available to the user logged in.

- Articles in typesetting (Shown to Editors and Production managers)
- Typesetting tasks (Shown to Typesetters)
- Proofing tasks (Shown to all Authors, Editors, and Proofreaders)

2.2.5.2 Articles in Typesetting

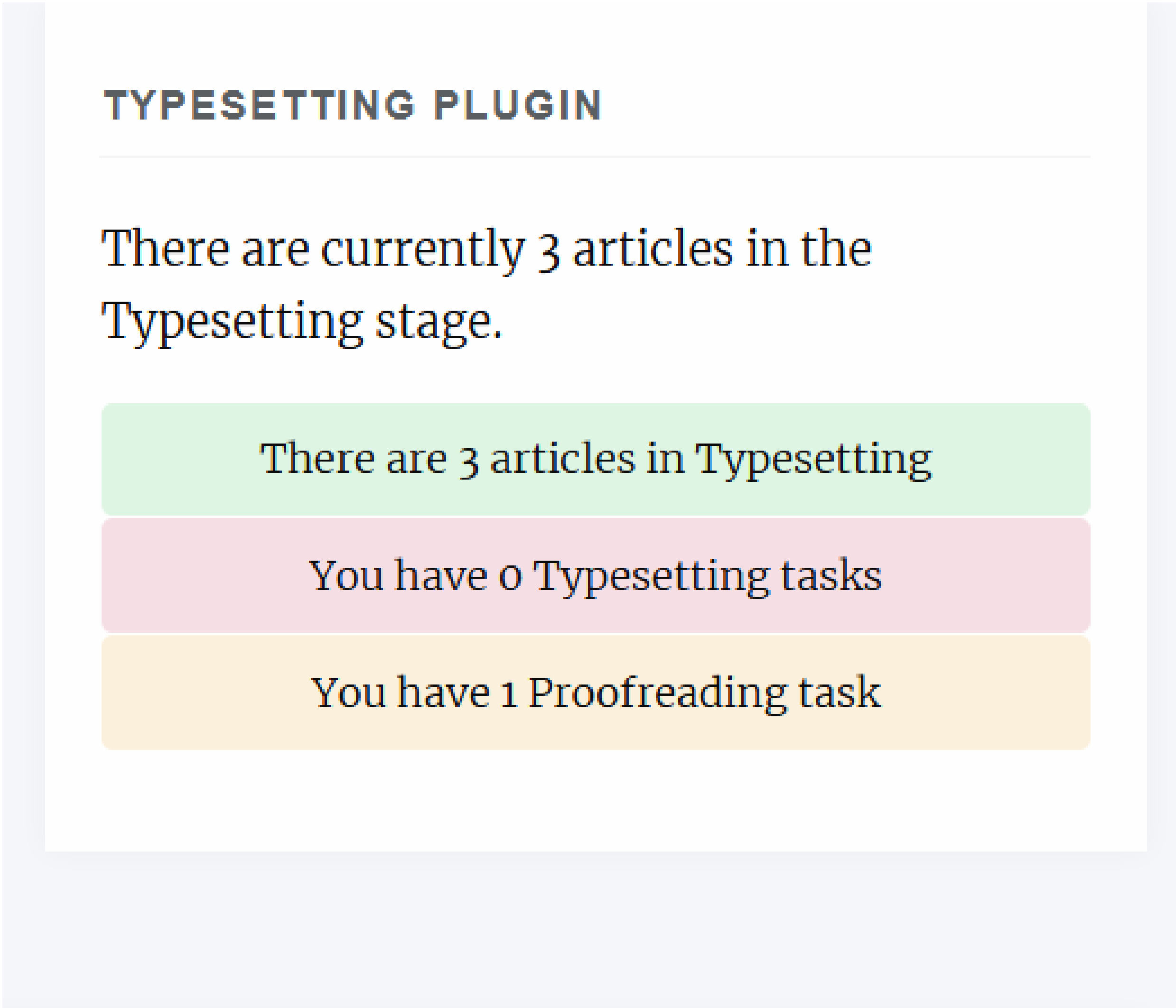
From this view, editors and production managers can see all the articles currently on the typesetting stage as well as an overview of their status. There is an option to "Claim" an article. It does not have any practical effects, other than displaying who is managing the article to all the members of staff. This doesn't not restrict access to the other editors and production managers in the journal.

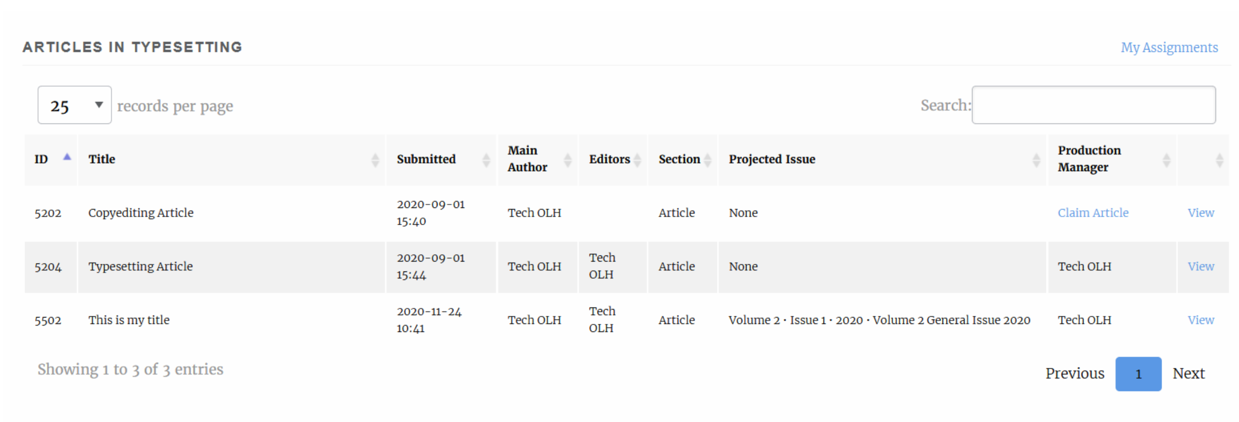
There is also a filter on the top-right-hand corner to display only articles that have been previously claimed by you ("My Assignments")

2.2.5.3 Typesetting Article (Editor/Production Manager view)

On this page, editors and production managers can control the production process of the article, including uploading article files, generating typeset files, or creating assignments for Typesetters and/or Proofreaders to upload new typeset files of proof typeset files respectively

As shown on the image above, there is a small step-by-step guide that assumes a user with the Typesetter role will produce the final Typeset file. This however, is not the only workflow possible with the Typesetting Plugin.


TYPESETTING PLUGIN
There are currently 3 articles in the Typesetting stage.
There are 3 articles in Typesetting
You have 0 Typesetting tasks
You have 1 Proofreading task


ARTICLES IN TYPESETTING
My Assignments
25
records per page
Search:
ID
Title
Submitted
Main Author
Editors
Section
Projected Issue
Production Manager
5202
Copyediting Article
2020-09-01 15:40
Tech OLH
Article
None
Claim Article
View
5204
Typesetting Article
2020-09-01 15:44
Tech OLH
Tech OLH
Article
None
Tech OLH
View
5502
This is my title
2020-11-24 10:41
Tech OLH
Tech OLH
Article
Volume 2 • Issue 1 • 2020 • Volume 2 General Issue 2020
Tech OLH
View
Showing 1 to 3 of 3 entries
Previous
1
Next

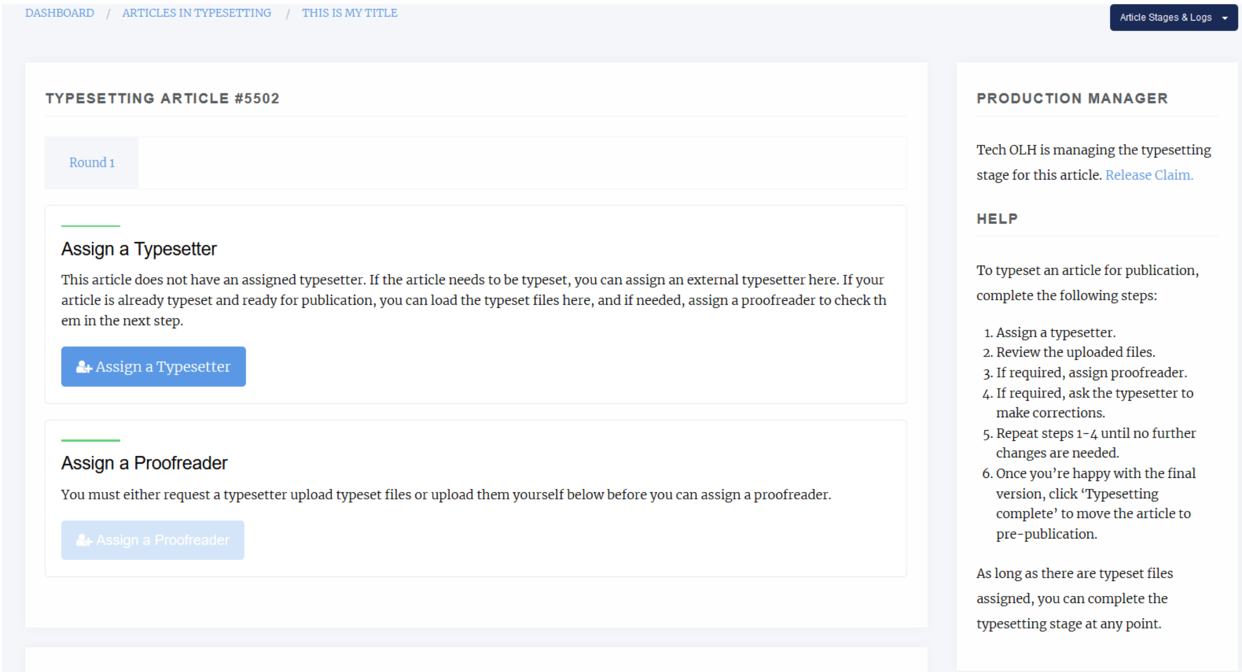


Fig. 28: Manager view of the 'Typesetting Article' page

2.2.5.4 Generating Typeset Files

The typesetting plugin supports 3 mechanisms for adding typeset files.

1. Manual Upload: If you produce your typeset files by yourself (e.g.: Generate a PDF from MS word or a specialised tool), scroll down to the 'Current typeset files' section' where you will be able to upload them. When selecting your file, you can also add a custom label. This label will be presented to users in the article page as 'Download <label>' (e.g 'Download PDF'). Janeway will always set the label automatically for common typeset file types (PDF, XML, HTML. . .). For unknown file types it will set it as 'OTHER'.

Tip: Labels can be used to denote the language of a file to readers. For instance labelling a pdf file as 'PDF (EN)' and another as 'PDF (ES)' will allow readers to download the correct PDF for their language

Tip: If you are unsure about the label to use, leave it empty. Janeway will try to workout the best label for your file and you can edit it later if necessary.

2. Generate a Typeset File with Janeway Tools: Janeway provides a plugin system that allows developers to write integration tools for the typesetting process. One example is the Pandoc Plugin. which can generate an HTML typeset file from a MS Word document. If you are interested on installing this tool others of this kind, check what is available with your site manager.

Tip: The first option is always 'Convert', which will make the current file available as a typeset file to readers. This feature is useful when you want to make the original manuscript file available for download to the readers as it is (e.g.: Allow the readers to read the original manuscript as a .docx or similar)

3. Delegate the task to a Typesetter: If your journal uses either a dedicated member of staff or a third party service

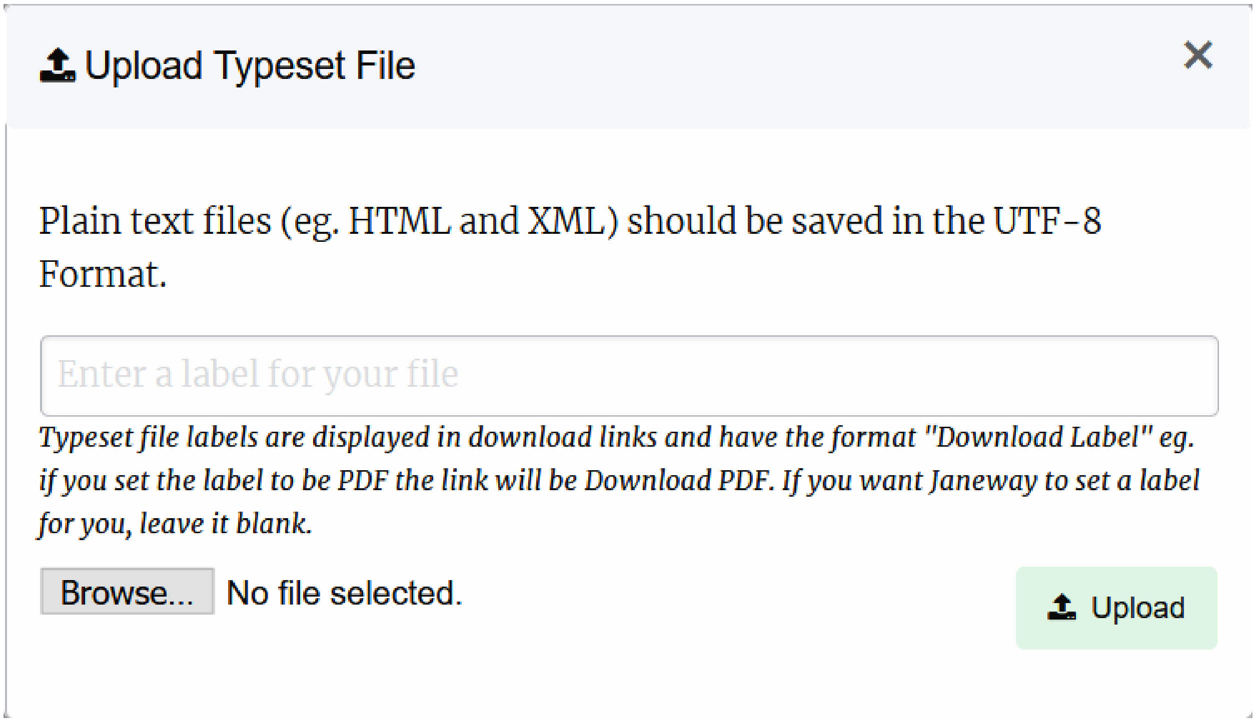


Fig. 29: Manager view of the 'Typesetting Article' page

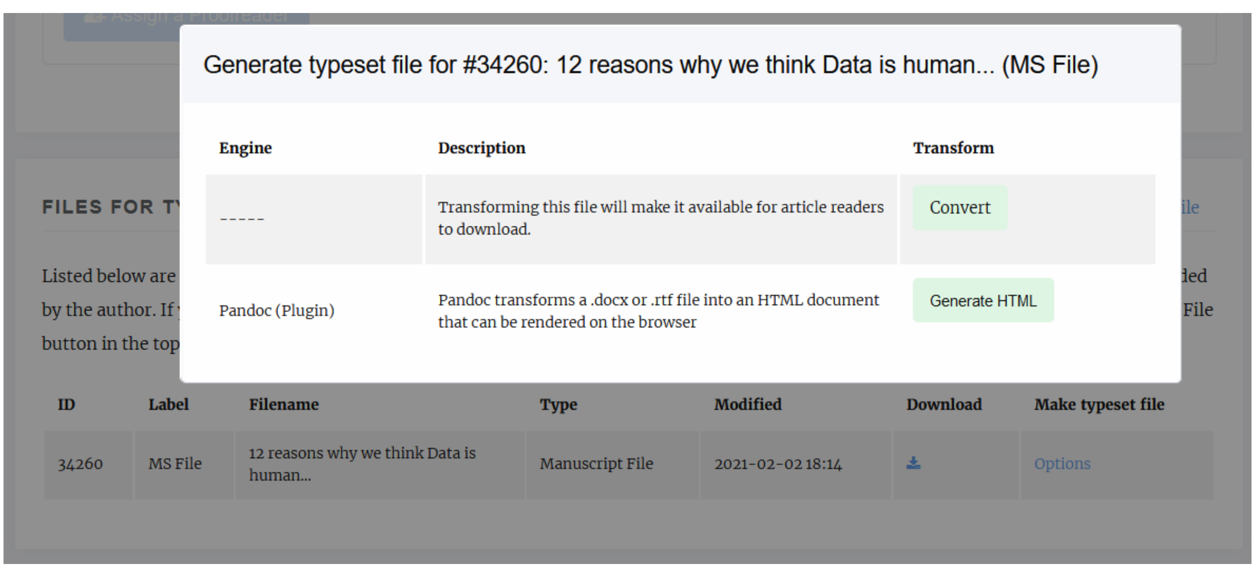


Fig. 30: Detail of the contextual menu for generating typeset files with plugins

for the generation of the typeset files, you can have them register on your site and enrol them as 'Typesetter' [TODO: link to roles docs]. Using this workflow will allow you to assign and manage typesetting tasks, handover the files for the authors/editors for proofing… All within the system. In order to assign a typesetter we recommend following these steps

3.1 Verify the 'Files for Typesetting': This section will show you all the manuscript files that have been created during the workflow, including the original manuscript, files for peer-review, copyedited manuscripts etc. You will be able to select one of this files as the source file for your typesetter to produce the typeset files. You will be able to select one or more of these files to be used by our typesetter. If you want to upload a new file at this point for the typesetter to use as a base, you can still do so from the 'Upload File' link on the top-right corner of the panel:

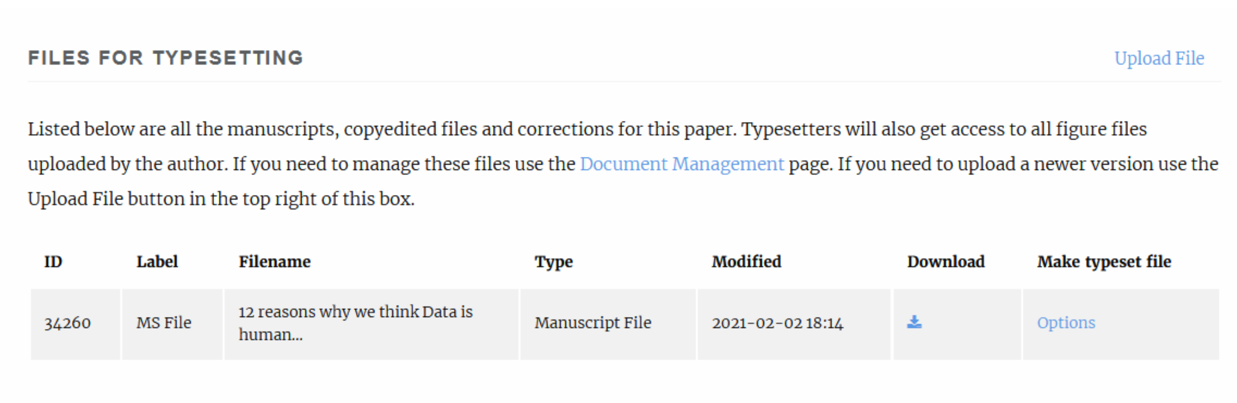


Fig. 31: Detail of the 'Files for Typesetting' section

Tip: Images and other supplementary files are not shown on this panel. They can be managed from the 'Document Management' button, under 'Actions'. The Document Manager is always available throught the workflow in case you want to check, replace or delete any files for the article.

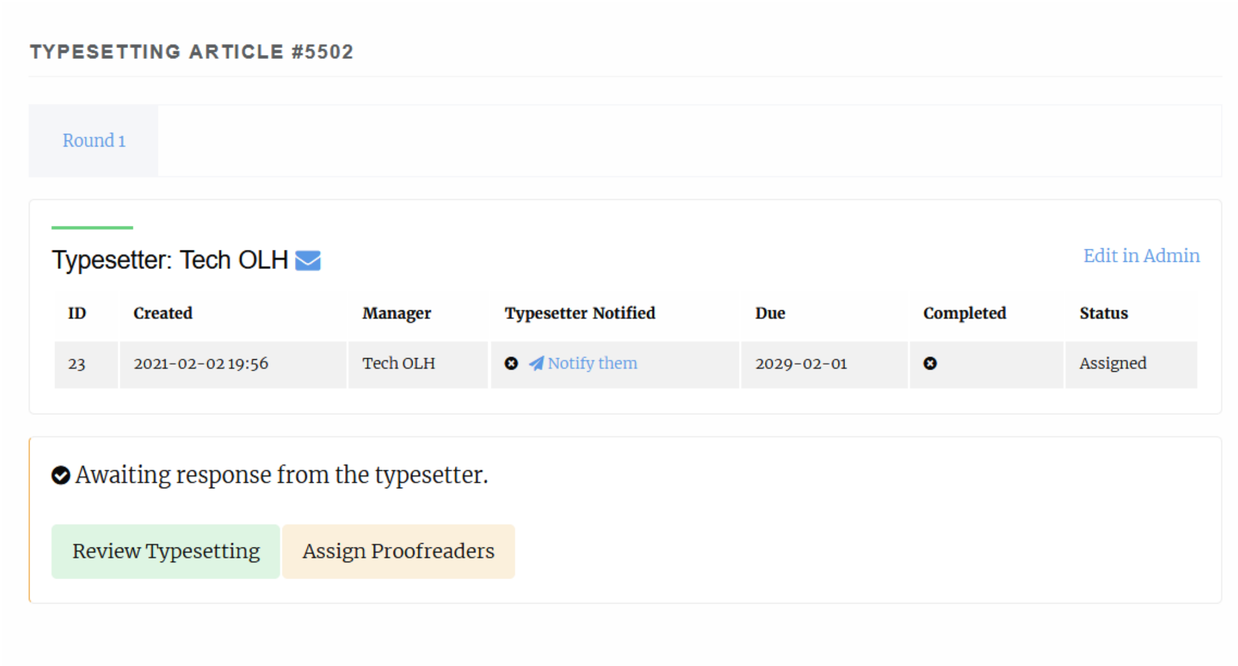
Tip: The typesetter will have access to all the metadata fields for the paper, so we recommend checking that you revise the metadata to ensure it is production ready. You can do so from the 'Article Metadata' under 'Actions.'

3.2 Assign a Typesetter: From this page, you can now create a task for the typesetter to get started with the production of the Typeset Files. At this point, you will have to select :

- A Typesetter to work on the article.
- One or more manuscript files the typesetter should have access to. (They will have access to all the image files)
- A Due date for the task to be completed by.
- A Message for your typesetter, describing any details about the file to produce. (They will have access to all of the article metadata)

3.3 Send a notification email: When you complete the previous form, you will be presented with a screen to check the notification email. You can tweak the notification before it goes out to the typesetter in case you want to add any extra details as well as an option to attach any files to the email. There is no need to attach any of the article files, they will have access to all the files you made available for them in the previous step once they log into the system. There is also an option to skip the email notification, however we recommend you always send out this notification.

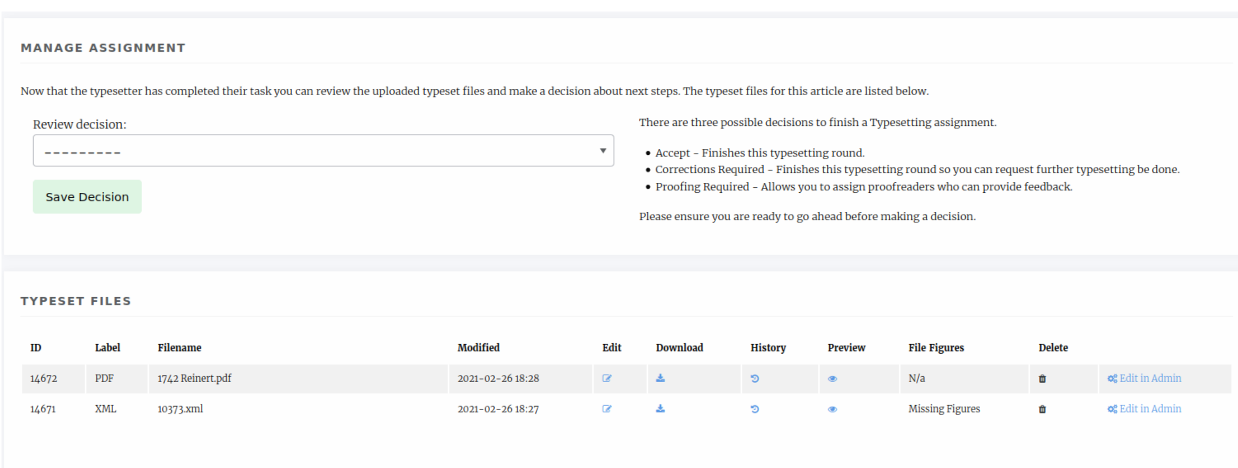
At this point, the task has been created and we can monitor its progress from the 'Typesetting Article' page.



It shows details such as the current status of the task, whether or not the typesetter has accepted/declined to do the task as well as its due date. The 'Review Typesetting' button will, at this point allow you to edit any of the details of the assignment such as the files made available, the task assignment or the due date, as well as let you cancel the task if needed.

2.2.5.5 Reviewing the typesetting task

Once the typesetter has completed their task, you will receive an email notification. The link on the email should direct you to the 'Typesetting Article', where you can hit the review button to check on the files provided by the typesetter:



As an editor or production manager we can now select one out 3 choices

- Request Corrections: If we notice a problem with the typeset files straight away, we can requet corrections to the typesetter.

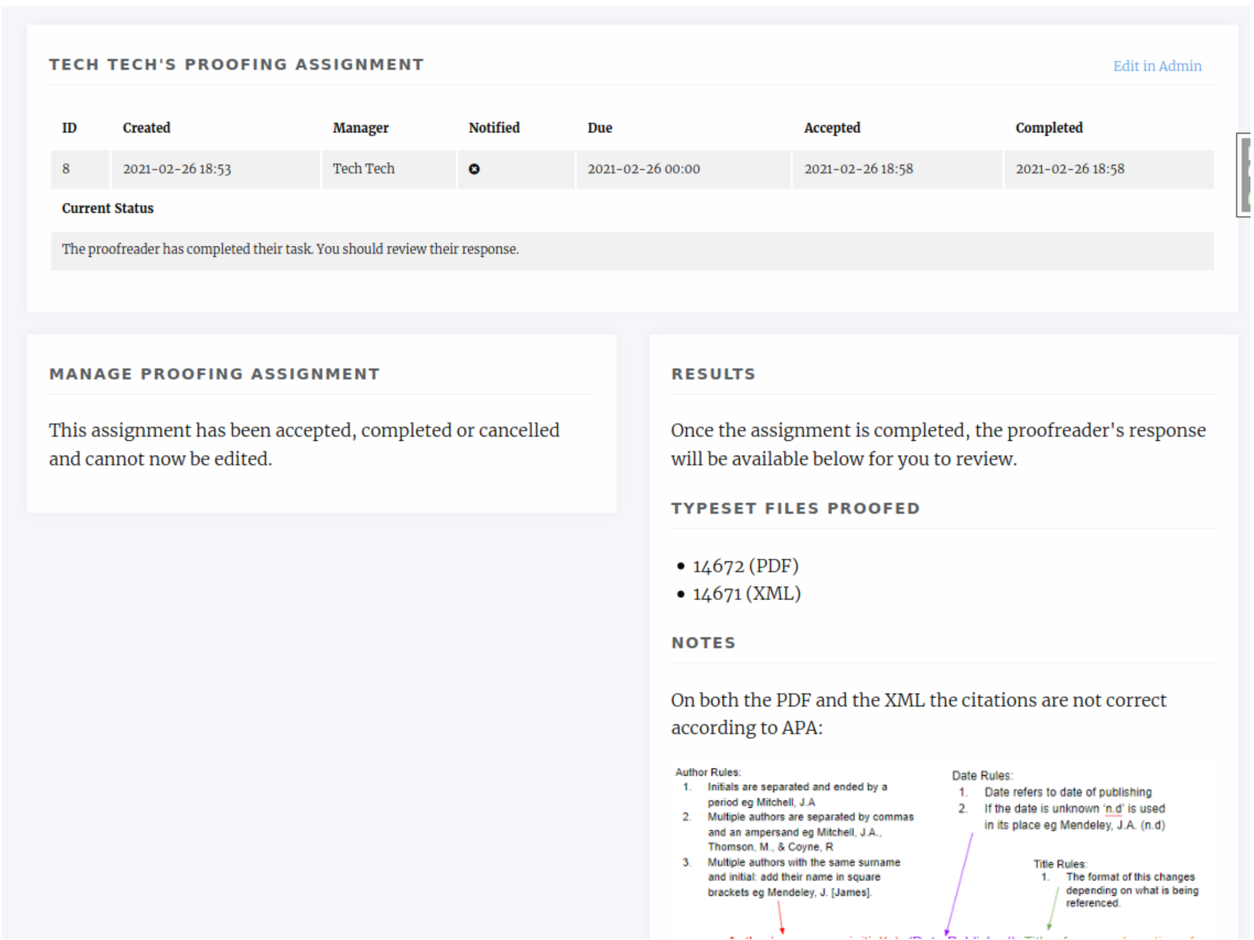
- Proofing required: Accepts the typeset files and records the decision to send the files for proofing
- Accept: If no further proofing is required, we can accept the files as they are and end the typesetting stage.

2.2.5.6 Sending a proofreading request

Files provided by the typesetter are usually sent to the authors, and potentially other editors, for proofreading. Janeway allows you to create a proofing task, where authors and/or editors can be invited to proof the typeset files.

2.2.5.7 Reviewing a proofreading request

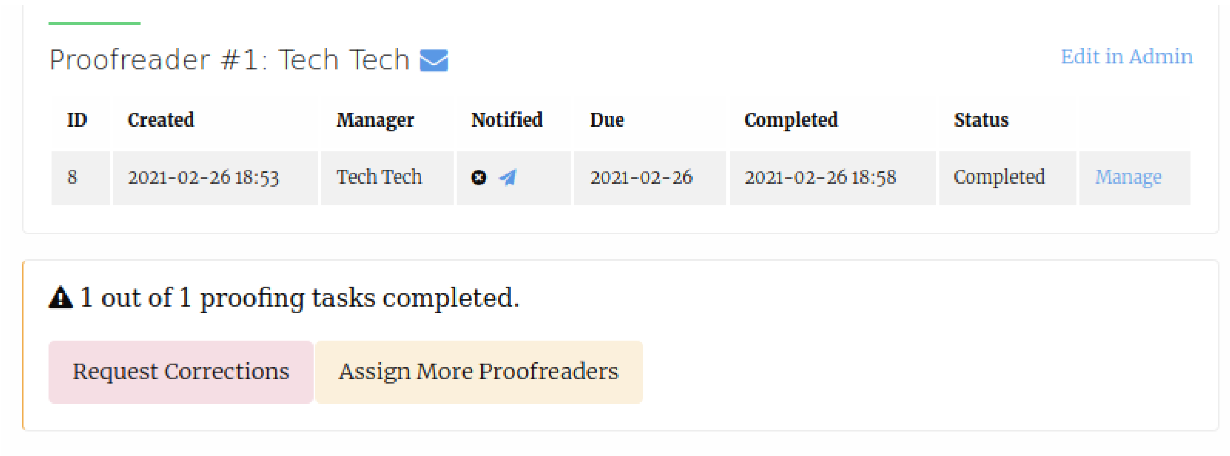
As the author/editors finish the proofing process you can review their comments.



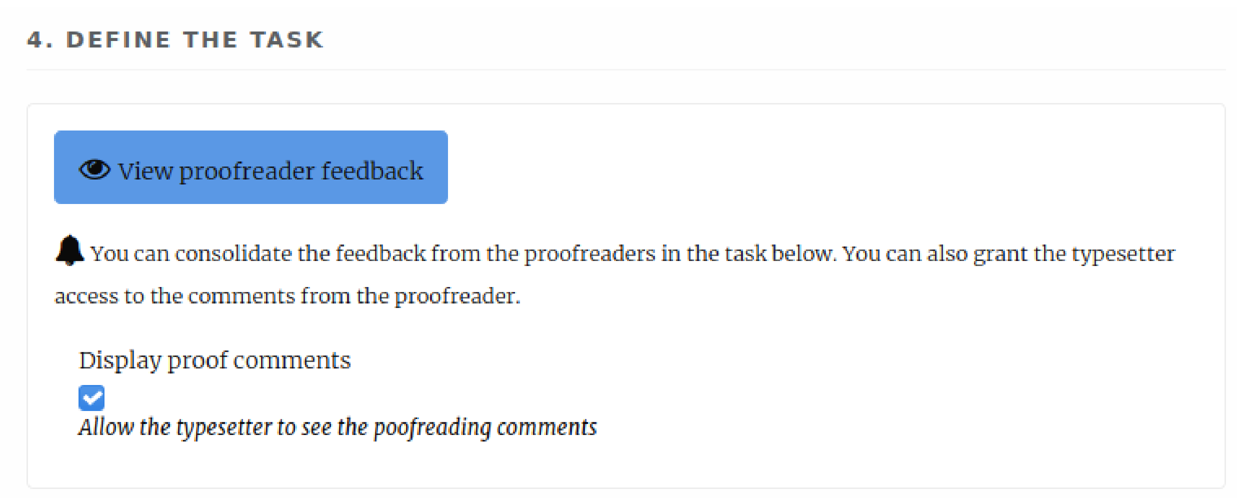
Depending on the feedback coming from the proofreading, it may be necessary to request corrections from the typesetter. In Janeway you can request corrections from the typesetter by creating a new 'Typesetting round' that initiates the typesetting process for the article with the difference that we can now include the feedback from the proofreaders on our task

2.2.5.8 Requesting Corrections

As soon as all proofing tasks are completed we will hit the request corrections button, which will start a new round of typesetting.



Now we can asssign a typesetter to work on the corrections (usually, the same typesetter that produced the Typeset Files in the first place). When creating the task, we will be presented with the option to include the feedback from the proofreaders.

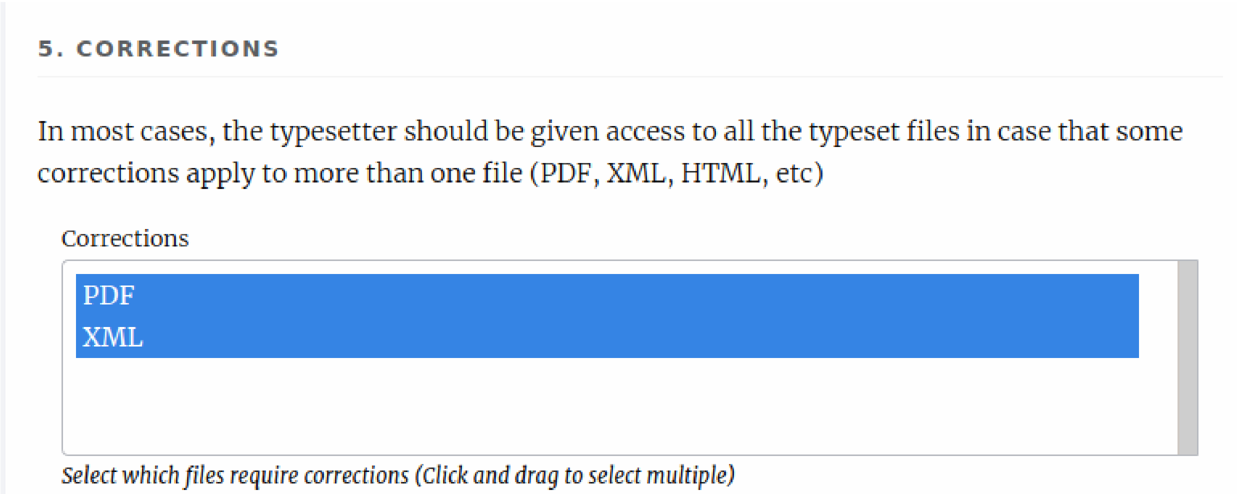


Even when the comments are made available, it is still recommended that the editor/production manager summarises the corrections requested using the "task" field (especially in cases where the proofreaders might request contradictory corrections). We can also select which files the typesetter needs to apply the corrections to:

After the task is sent out, we just have to wait for the typesetter to complete it, at which point we can review their work and dispatch new proofing tasks to the author if necessary, or accept their changes and complete the process.

2.2.5.9 Supplementary Files

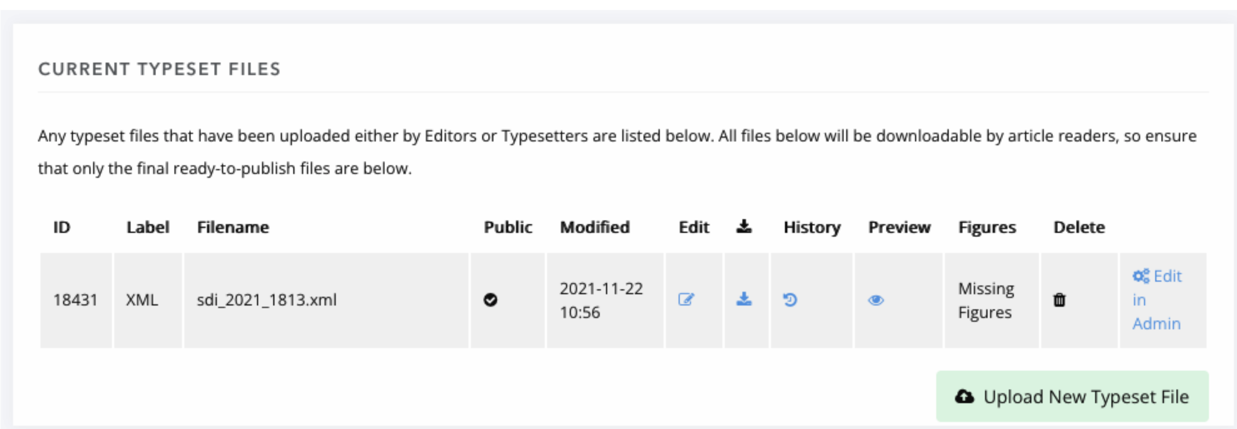
Authors are able to upload supplementary files to Janeway as part of their submission. If the intention is to host the file on Janeway Editors can create a Supplementary File object and assign it a DOI within Janeway. This section is located at the bottom of the Typesetting Article page. If the file isn't already uploaded to Janeway you can opt to upload a new file.



Tip: You should create the supplementary file object in advance of sending the article for typesetting where possible and notify the typesetter (if you use external typesetters). They will be able to see the file record and the DOI that has been assigned to it.

2.2.5.10 Managing Typeset Files/Galleys

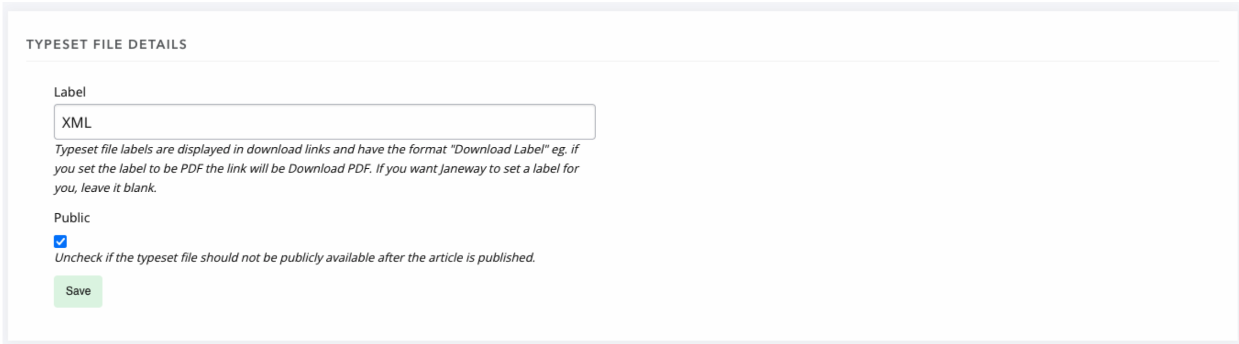
Once a typesetter or production manager has uploaded typeset files into Janeway they become manageable within the system. To manage a typeset file/galley press the Edit icon on the relevant table row.



An XML typeset file with missing figure files.

File Detail

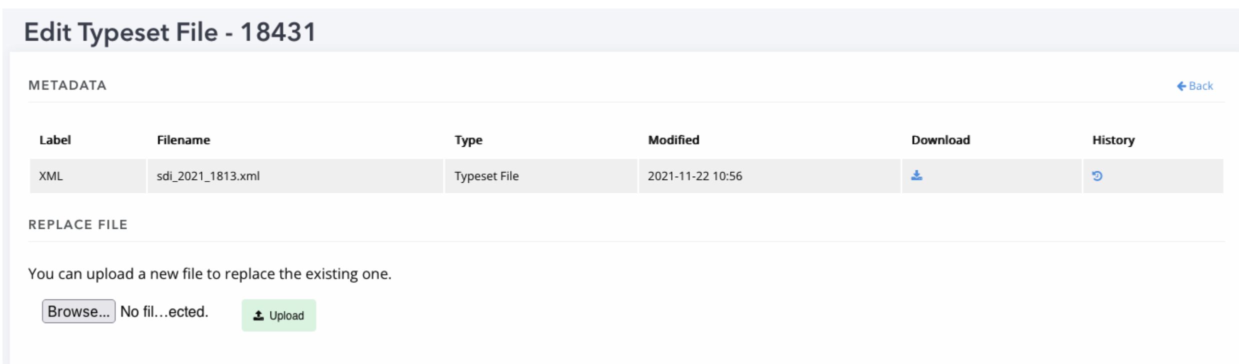
The file label is displayed on the main article page and is displayed in the format "Download Label". If you set the label to XML it will read "Download XML".



Tip: When uploading a PDF, XML or HTML file Janeway will set the label for you automatically if you leave it blank.

You can also mark a typeset file as not for public consumption by unchecking the "Public" field in this section.

Replacing the Typeset File



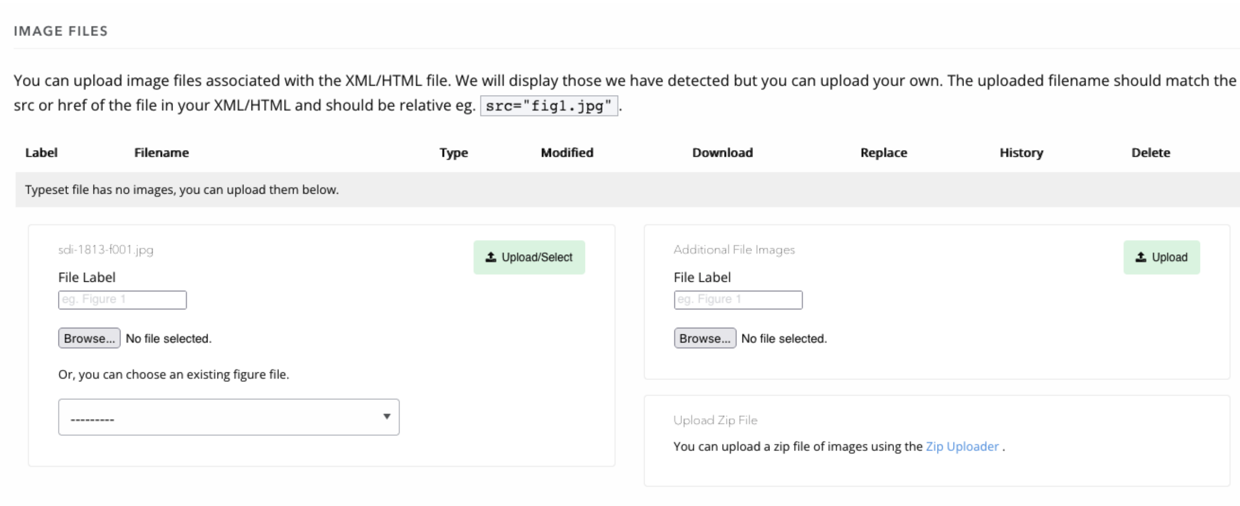
If you need to upload a new version of the typeset file you can do so from within the Edit Typeset File screen. Browse for the new file and click Upload. The old version of the file is retained. Alternatively you could mark this file as not public and upload a new typeset file if you wanted to keep two separate file records.

Image/Figure Files

HTML and XML files that are uploaded will be scanned by Janeway to detect graphic, figure or img tags. If tags are found that have no corresponding Image file will report on the main typesetting page as having missing images. (see figure at the top of this section for an example). You can load up images against a typeset file by editing it and scrolling to the Image File section.

For each missing image file Janeway will present you with a block where you can either upload a new image file or select an existing one from the images already linked to the article.

Tip: For typeset files with a large number of images you can also create a zip archive and place an image (with a name matching those in the file) and upload it using the Zip Uploader. Janeway will unzip the archive and assign the images based on their name.



CSS File

If a given article requires special styling you can upload a CSS file alongside it and Janeway will output it on the article page.

> **Warning:** The CSS uploaded here should only target elements inside the <article> block otherwise it could break general styling of the site.

XSL File

Janeway's XSL Transformation process uses a version controlled XSL (Extensible Stylesheet Language) file. When you upload a JATS XML file to Janeway it marks the file as using the current XSL file. This means that as we make changes to the XSL file it will only affect future files uploaded and not any back content.

> **Warning:** Changing a XML file's XSL may cause it to render differently. It is only recommended that you do this before sending it for Proofreading.

2.2.6 Pre Publication

The Pre Publication stage of the workflow takes you through the last checks before publication, going through each of these final elements step by step. There are some key things to look out for in Pre Publication, outlined in bold below.

2.2.6.1 1. View Metadata

View Metadata, the first step in Pre Publication, is where editors can make final checks and alterations to author abstracts, titles, licences, article citation and names/contact details. It is important to ensure that the abstract and title in the metadata exactly match the abstract and title of the PDF file (often, authors change their abstract during revision and copyediting, so the original abstract needs updating before publication). **The metadata abstract is displayed when you preview the XML file** (if you are using XML files) **in the Typesetting Plugin or Production stage.**

If you copy and paste an abstract into the metadata, ensure you paste this in without formatting and, if necessary, use an HTML cleaning tool so that the abstract text matches the formatting of the rest of the XML text. **Use the preview XML file function in the Typesetting Plugin to check abstracts have updated correctly.**

It is very important, for Open Access compliance purposes, that the licence selected in the metadata matches any licensing information given in the footer of the PDF file.

Warning: ** If an author requests a non-standard licence, this should be flagged in advance to the typesetters.**

Once you have thoroughly checked the metadata, check the 'Mark as Complete' box to move onto the next step.

2.2.6.2 2. Set Issue

Set Issue, the second step in Pre Publication, is where you can assign the article's issue(s), if this has not been done already. Click 'Add to Issue' to add to an existing issue (you can select more than one issue if needed, for example, if the article is part of a special issue as well as a journal volume) or 'Create an issue' at the bottom of the pop up window if the article belongs to a new issue. Then click the X at the top of the pop up box to close.

Check the 'Mark as Complete' box to move onto the next step.

2.2.6.3 3. Verify DOIs

Articles usually have a DOI, or Digital Object Identifier, automatically assigned and 'minted' (created) for them by the system. This unique digital link to the article is usually created automatically for you by the system, and the Verify DOI stage lets you check if the DOI has been issued successfully or if there are any problems. If the DOI only has two 'hops', or two steps shown as bullet points in the Verify DOI stage, this means that no further changes are needed and you are ready to proceed. You can verify that the article's DOI is resolving correctly by clicking 'Edit' in the top right hand corner of the pop up window and checking that the 'Status' column reads 'Success'. If the DOI Status is listed as pending, or blank, click 'Poll for DOI Status'. If no DOI has been assigned, click 'Issue DOI'. NB that newly issued DOIS can take a while to go through.

Check the 'Mark as Complete' box to move onto the next step.

2.2.6.4 4. Select a Galley for Rendering

Select either an XML or HTML file (for OLH journals there will only be an XML or PDF file: always select the XML file for rendering). **Check to make sure no additional files other than publishable galleys are visible here.** If they are, they will also be published alongside the publishable galleys. If any other files appear here return to Typesetting Plugin or Production to delete any other files that have accidentally been added as galleys before proceeding.

Warning: If you have not done so already, double check (in the Typesetting Plugin or Production stage) that any typesetting queries at the very end of the PDF have been addressed and removed.

Check the 'Mark as Complete' box to move onto the next step.

2.2.6.5 5. Set a Publication Date

Select a date and time for publication. Selecting today's date will make it available immediately. A date for publication must be set for the piece to publish.

Check the 'Mark as Complete' box to move onto the next step.

2.2.6.6 6. Select Article Image

Upload an image (JPG, PNG or GIF formats are accepted – **NOT PDFs**) in the pop up window. Rectangular or landscape images work best, as this image will usually sit at the top of an article.

Tip: You can source many free-to-use images from Unsplash.com. Aim to choose eye-catching images that are relevant to the article. If you are sourcing images from elsewhere, be aware of any copyright restrictions and only use images that you are permitted to reproduce.

Once you have completed the steps in Pre Publication and have set a date and time for an article to be published, go into 'Edit Article Images' to select a thumbnail image (which can be the same image used for the article banner).

Tip: As thumbnail images display at the same width to height ratio as they are uploaded, you may want to use an image editor to crop your chosen thumbnail image into a square shape, with the same height and width, for consistency.

Check the 'Mark as Complete' box to move onto the next step.

2.2.6.7 7. Notify the Author of Publication

The pop up window generates an email template which enables you to notify the author, section editors and copyeditors that the article has been or will shortly be published. You may amend and send the template email to notify the author accordingly. The dates/times that you see here correspond either to the timezone set in your user profile, or the default timezone (UTC).

Check the 'Mark as Complete' box to move onto the next step.

Now click 'Publish this Article' at the top of the right hand column. Your article has now been published, or will be ready to publish at the time and date previously set. When the article goes live, always check that the article is displaying correctly on the homepage, on the Articles page and in its XML/HTML and PDF formats.

The publishing workflow is now complete – congratulations on your finished article!

2.3 Reviewer Guide

Reviewers can access reviews in two ways:

1. Using the link in their request email
2. Checking the Review section on the Dashboard

2.3.1 Direct Link

If the journal has enabled one-click-access reviewers should be able to go straight to the review page bypassing the login screen using a shared secret key. Otherwise, the reviewer will have to login as normal.

2.3.2 Dashboard

If you login to a janeway journal and are a reviewer for that journal you will find a review section on your dashboard where you can see if you have any active review requests.

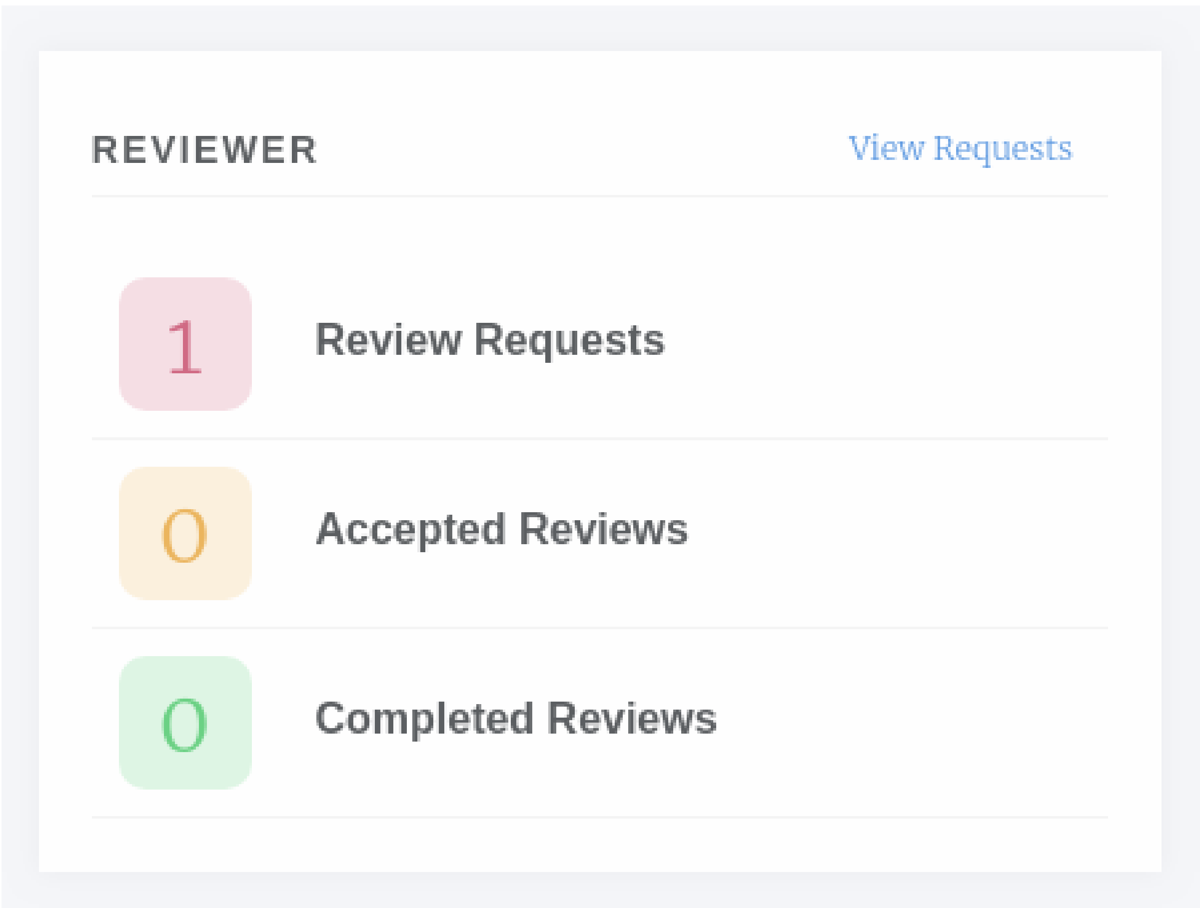


Fig. 32: The review dashboard block

2.3.3 Review Form

Either way you will come to the Review Form page. It is split into three sections.

1. Review Guidelines
2. Review Files
3. Review Form

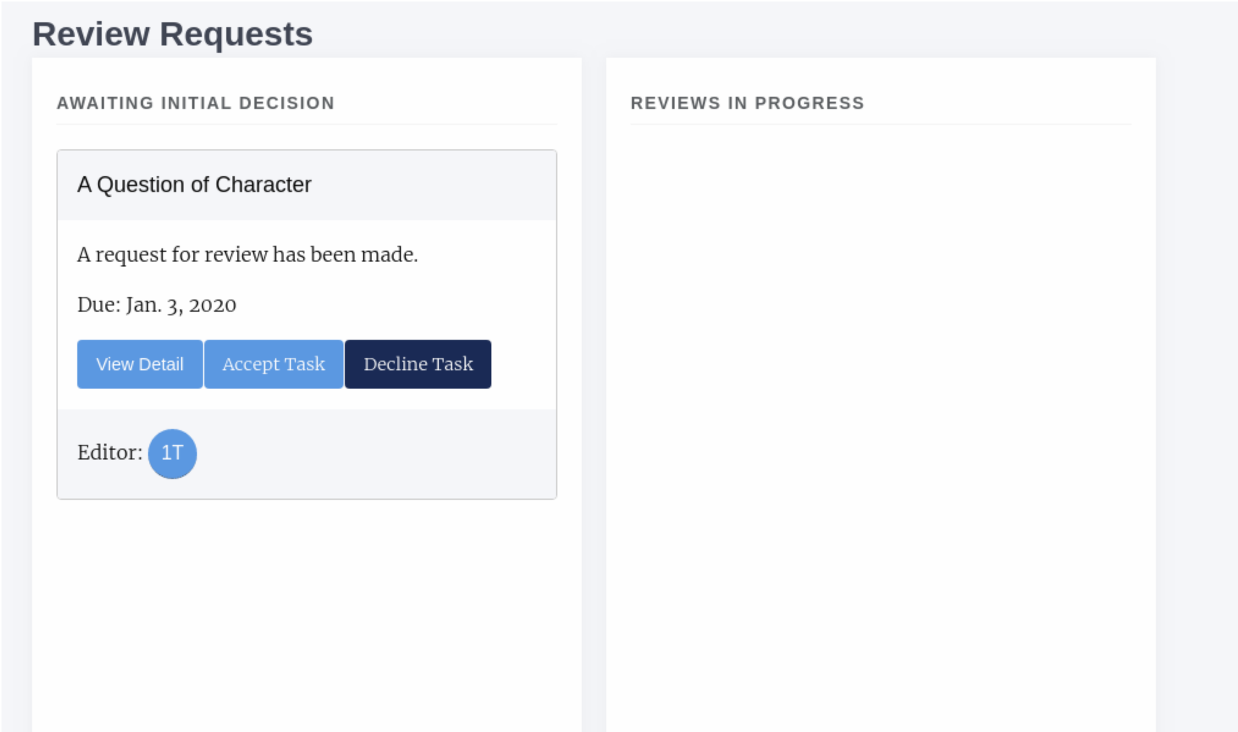


Fig. 33: On the reviews page you can see new requests and outstanding review requests

2.3.3.1 Review Guidelines

The review guidelines section displays information on how the editor would like you to undertake the review. There are general review guidelines and guidelines that are specific to this review form (as journals can have multiple forms).

Also in this section you have an option to accept or decline the review. If you used the Dashboard > Review Requests > Review Form route and have accepted already you may only see the Decline button. If you opt to decline to review you will be asked if you can suggest any other reviewers who may be suitable.

2.3.3.2 Review Files

A list of the review files that the editor has selected for you to use to complete the review are listed here. Sometimes there can be quite a few files so you also have the option of downloading them as a zip file.

2.3.3.3 Review Form

The review from is where the magic happens! It can be a single large text box or multiple boxes with checkboxes and drop downs. Each element in the form will have help text to assist you in completing it.

The sections of this form are:

- **Review File**
  - Here you can upload your review if you want to complete if offline, though this may be disabled on a journal by journal basis.
- **Review Field**
  - This is the main review form element, it could be made up of one or many questions

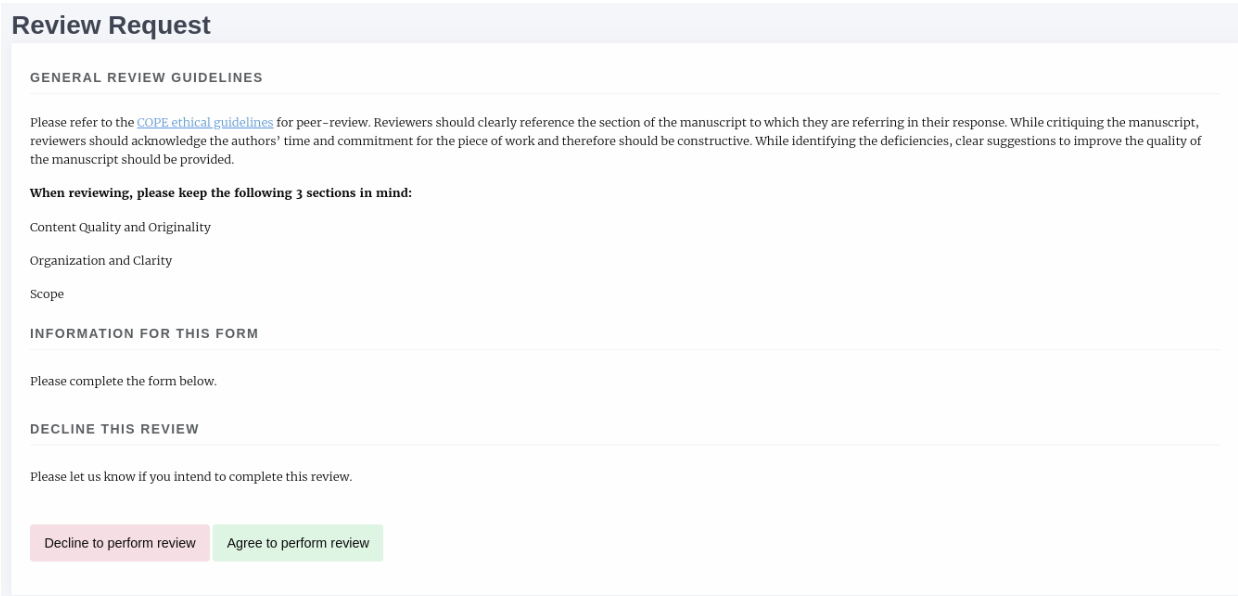


Fig. 34: Guidelines for the default review form

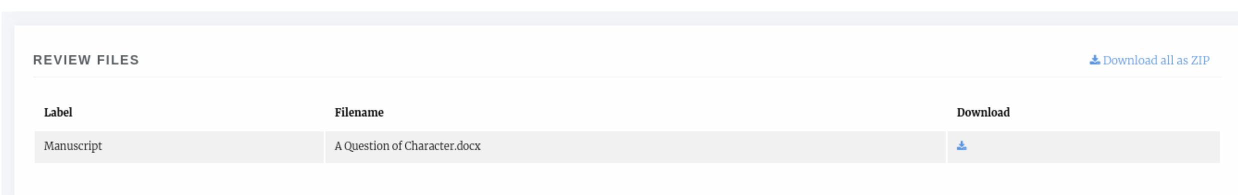


Fig. 35: In this instance there is one review file but there may be more, including figure files

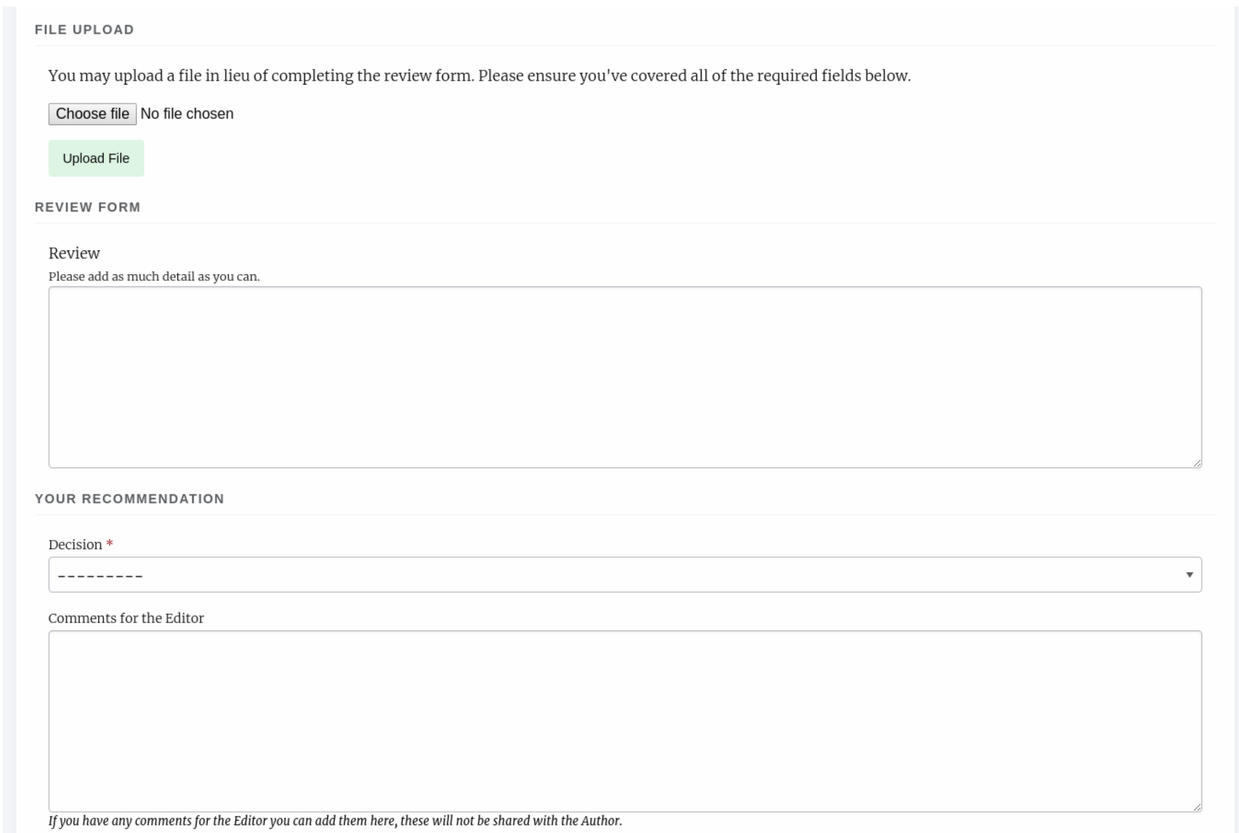


Fig. 36: A review form

- **Recommendation**
  - **You are asked to make a recommendation from the following options:**
    - Accept
    - Decline
    - Minor Revisions
    - Major Revisions
- **Comments for the Editor**
  - If you have any additional comments they can be added here, these are for consumption by the editor only.

2.3.4 Review Complete

Once you have submitted your review you will be shown a run down of what you submitted. Please note you will not be able to go back once you have pressed submit.

2.4 Copyeditor Guide

As a copyeditor you may be assigned copyediting tasks for a paper. When a new assignment is made you will receive and email and be able to see the requests from the journal dashboard.

If you use the link in the email or click the View Requests button you will be able to see three lists of copyedit tasks.

- **Awaiting Initial Decision**
  - New tasks you have not accepted or declined.
- **In Progress**
  - Tasks you have accepted but not completed.
- **Completed**
  - Tasks you have completed.

To start a new task press the Accept button and it will move to the In Progress column. To start the copyediting process you can click View on a card in the In Progress column.

2.4.1 Copyediting a Paper

Janeway presents an interface for copyeditors broken into three sections:

- **Guidelines**
  - Here the journal's copyediting guidelines will help you complete your task.
- **Article Files**
  - A list of the files supplied by the editor for copyediting, you can download these files so you can then copyedit them.
- **Copyedited Files**
  - A list of files you have uploaded. Use the Upload File button to add a new file.
- **Complete Task**

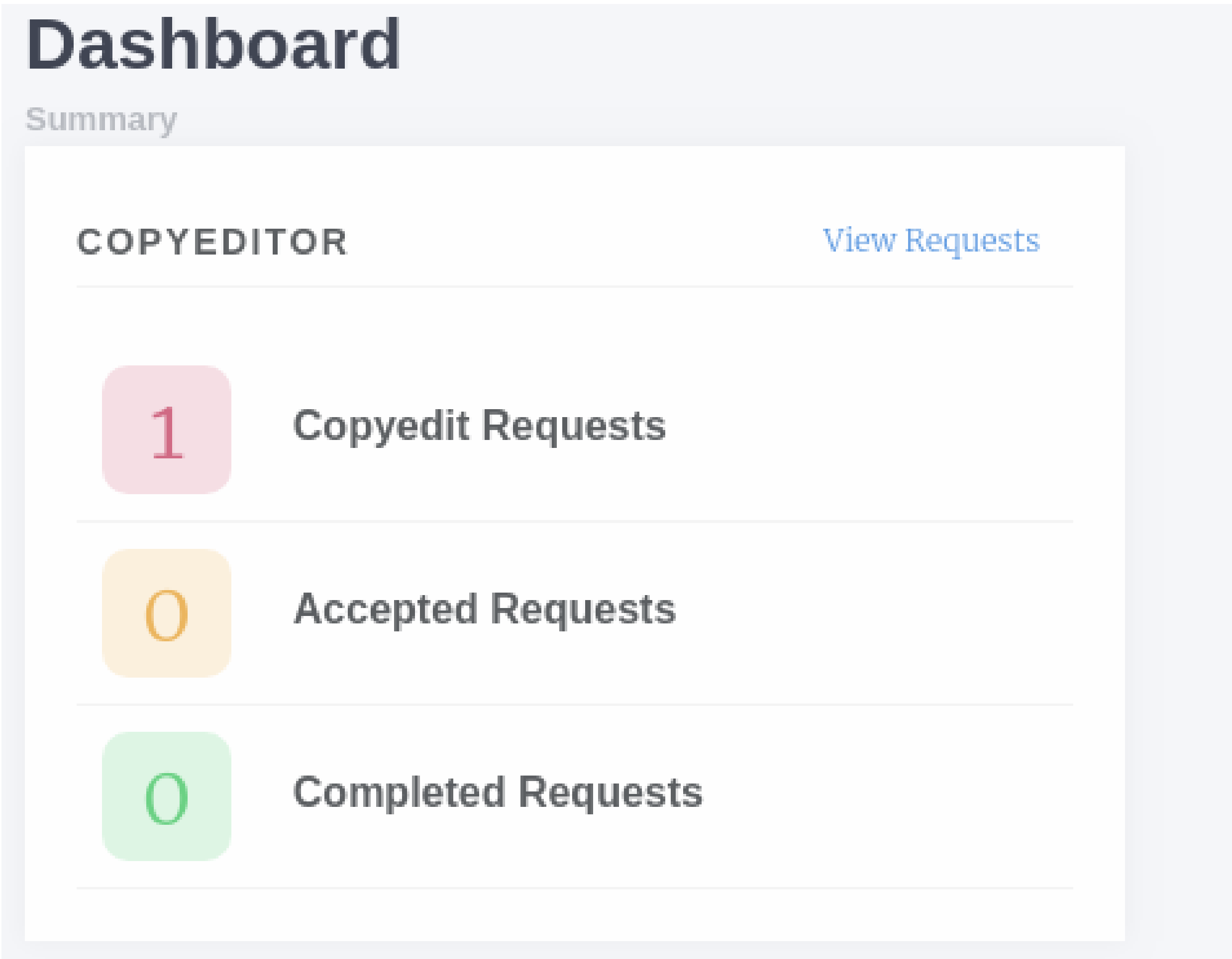


Fig. 37: Copyeditor dashboard block

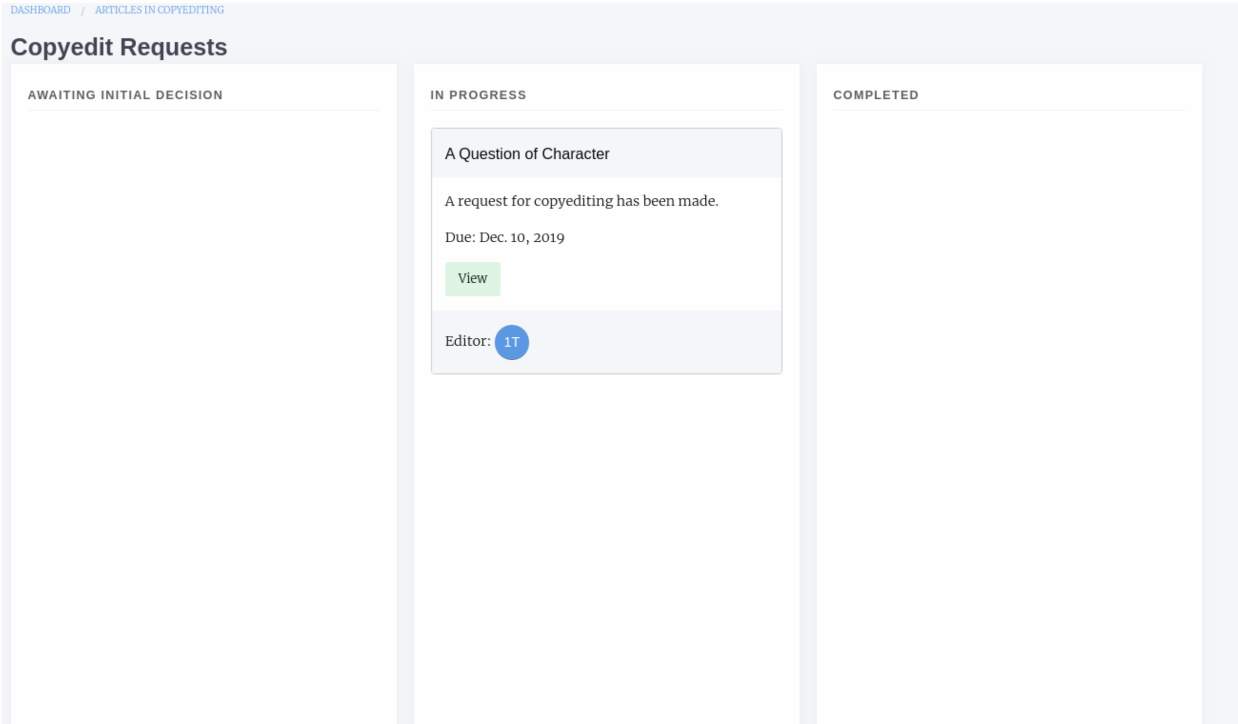


Fig. 38: A task that has been accepted

- Here you can enter a note for the editor and mark the task as complete.

Once you complete the request the card will move to the Complete column.

The editor can then either accept your copyedited manuscript and move onto the next workflow stage or send it to the author for review. The author can then supply feedback and the editor can decide whether to accept or send it back to you for more copyediting.

2.4.2 Reopened Task

If the editor has reopened the task you will receive an email and be able to see the request on your dashboard.

Note that the task will appear twice, the one in the Completed column is the original task. You can press View to look at the copyedit task and will probably see a version of the paper uploaded by the author, the screen looks similar as above. When you are happy complete the task and it will be closed off.

2.5 Typesetter Guide

When a typesetting task is assigned you will receive an email notification and also be able to see the task on your dashboard under _Production_.

Clicking on view requests will display three columns

- **Awaiting Decision**
  - New Assignments.
- **In Progress**

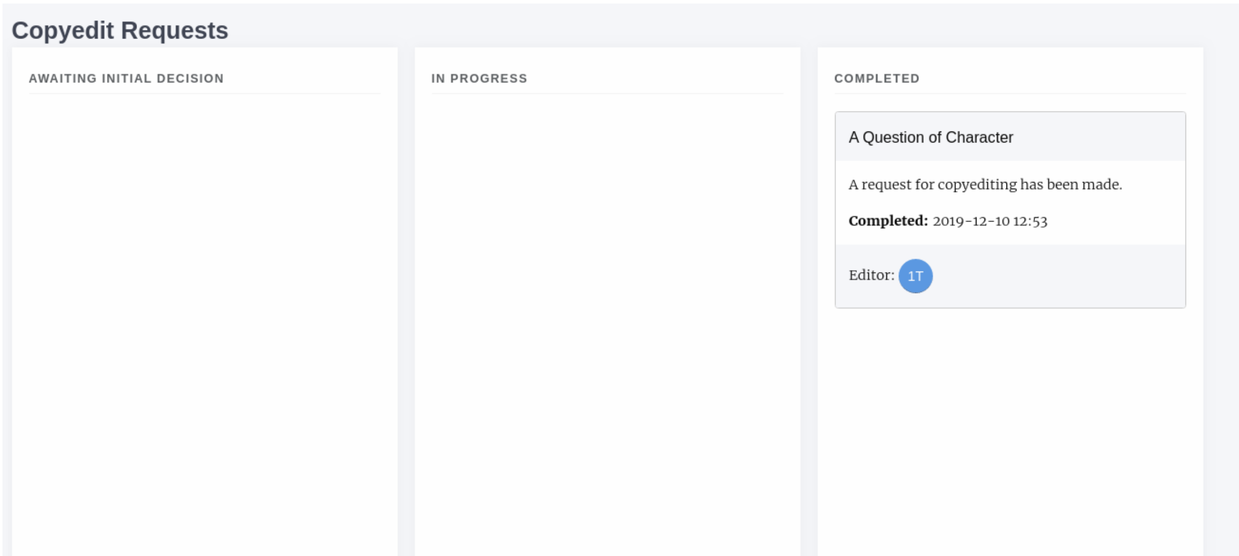


Fig. 39: A task that has been completed

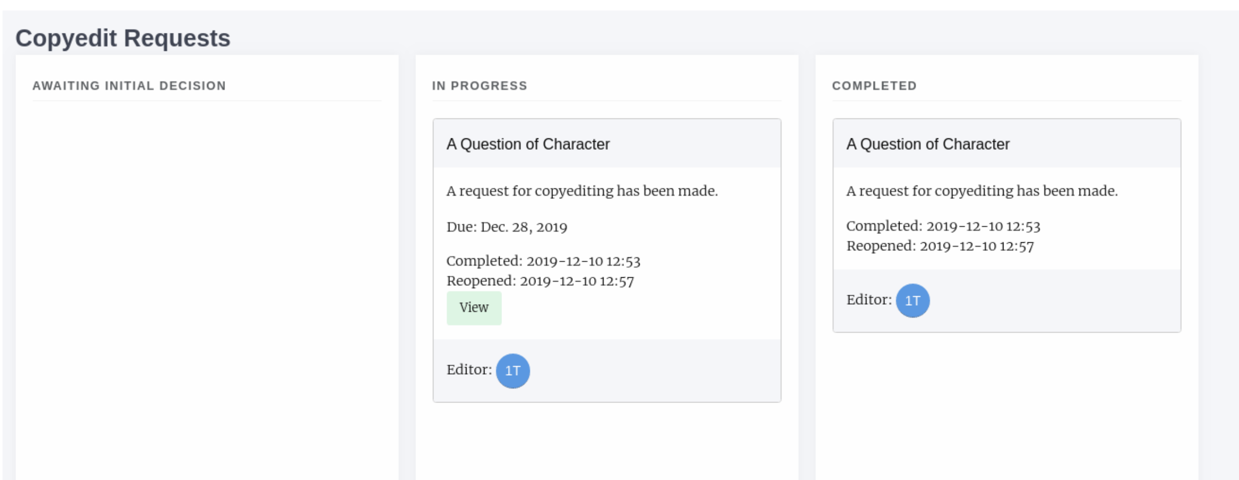


Fig. 40: A task that has been reopened on the left and the original completed task on the right

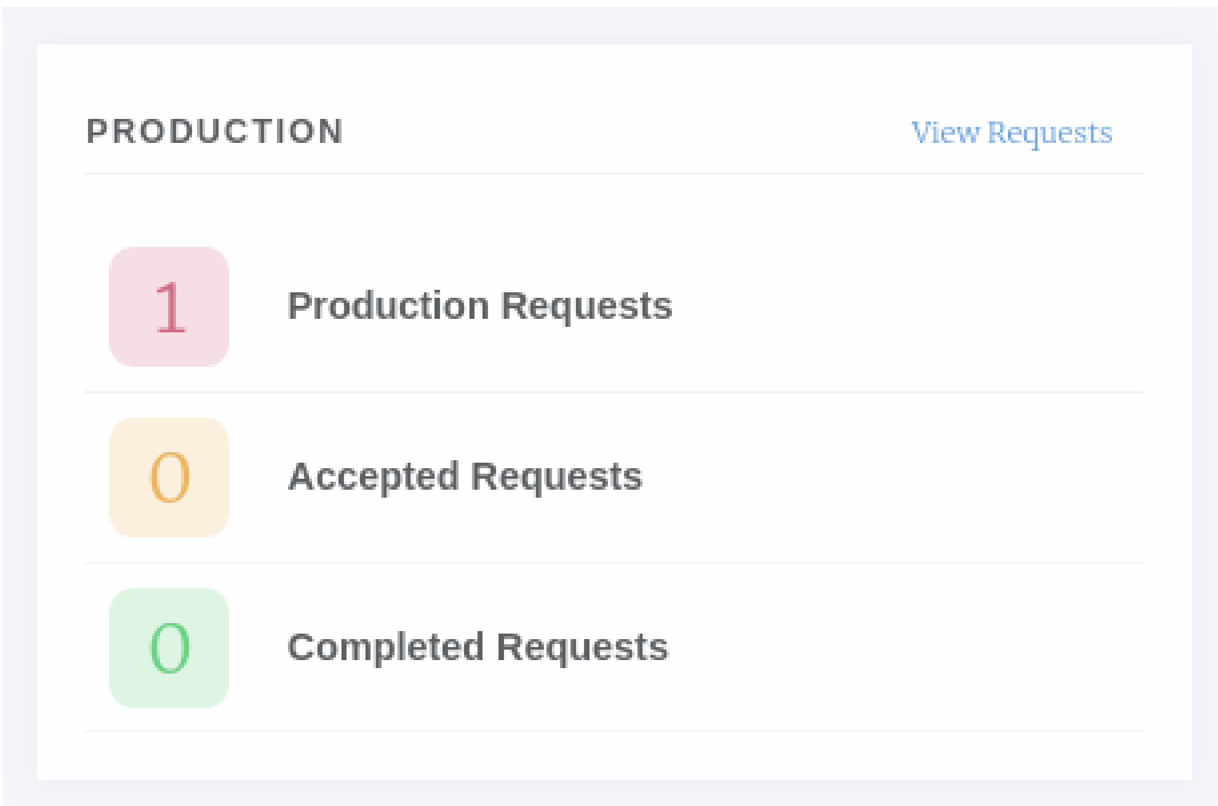


Fig. 41: Production block

   - Assignments you have accepted but no completed.
- **Completed**
   - Assignments you have completed.

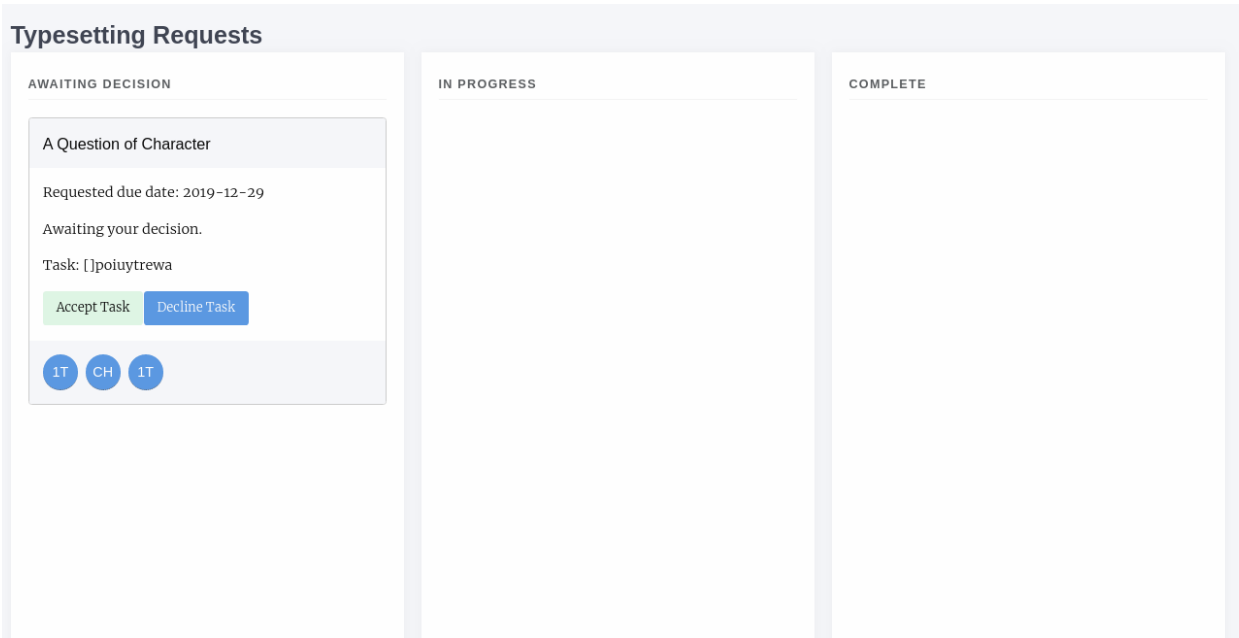


Fig. 42: Typesetting requests

2.5.1 Typesetting a Paper

Once you have accepted a request you can then use the view button to display the typesetter interface. This allows typesetters to pull files and view the metadata of the paper so they can produce Galley proofs. The interface is broken in 4 sections.

- **Files uploaded for production**
   - Lists the files that are to be used in generating the galley proofs.
- **Current Galleys**
   - Lists any galley proofs that already exist.
- **Source Files**
   - This is an area for you to upload any intermediate source files (indesign etc).
- **Notes**
   - Displays the request from the editor and a link to view the article's metadata.

2.5.2 Uploading a Galley

You can use the Upload a new galley button to upload a new file. There are three upload options.

- XML/HTML
- PDF

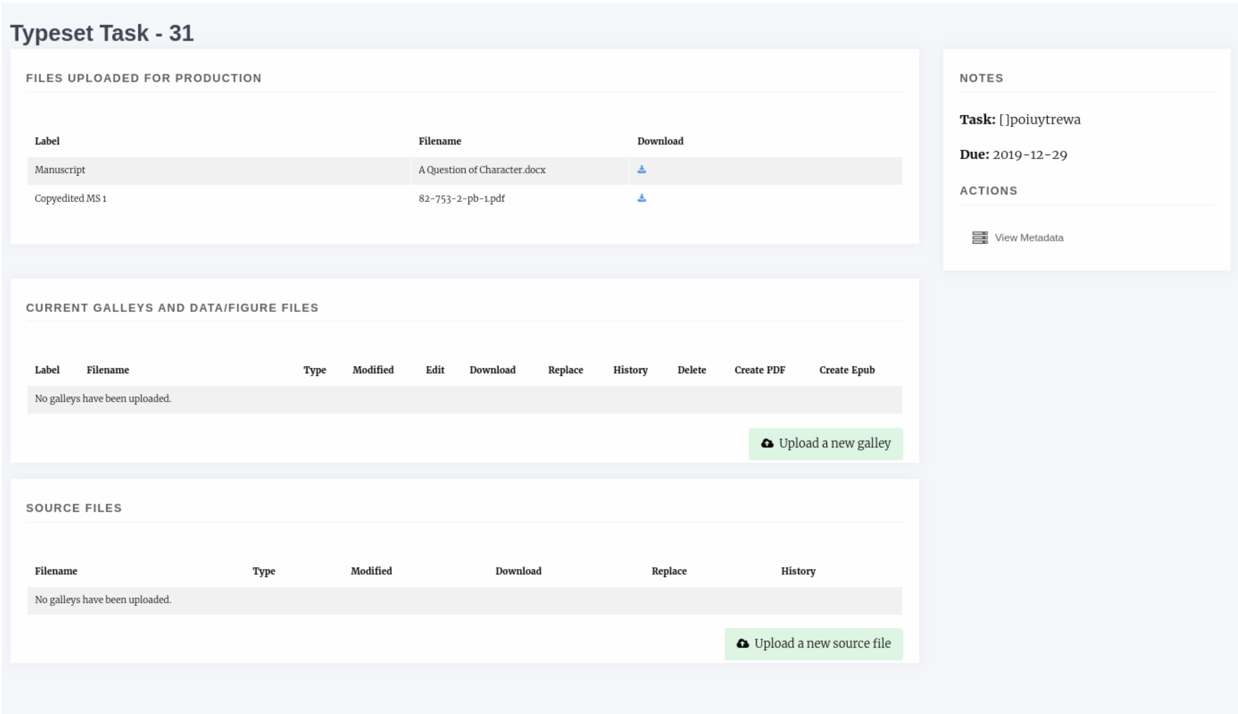


Fig. 43: Typesetter interface

- Other (for any other file types)

Janeway processes each differently (or in the case of Other, not at all) so ensure you select the correct upload box.

> **Warning:** Janeway operates with the UTF8 encoding, so you should ensure your plain text galleys (HTML and XML) use this encoding.

2.5.2.1 Missing Supplements

When you upload an XML or HTML galley Janeway will scan it for images and warn you if there you need to upload those images. You can do this by editing the galley file.

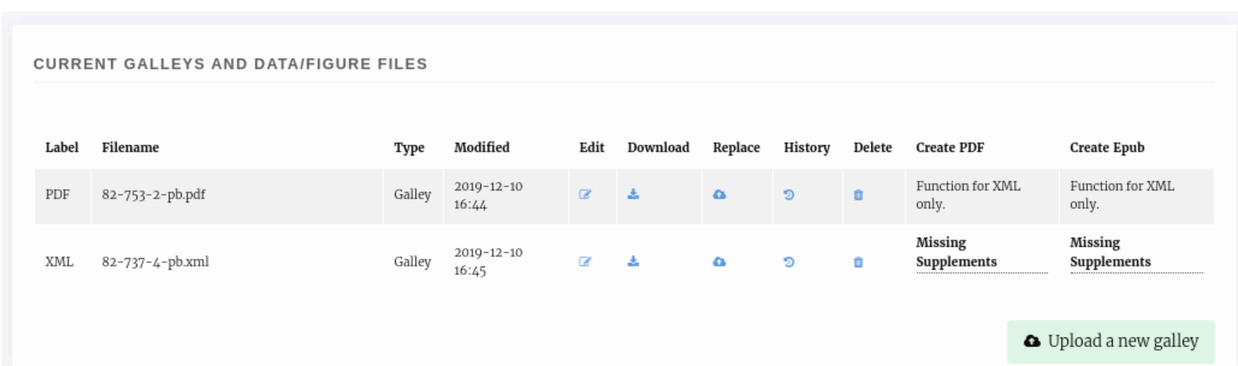


Fig. 44: Article with galleys, XML galley has two missing images

In the Edit Galley screen you can upload individual image files, select from exising figure files or upload a zip file of images.

Tip: If you have lots of images ensure they have the correct name (eg, whatever they are called in the XML/HTML file) and zip them. You can use the zip uploaded to upload them in one go.

2.5.3 Managing Galleys

In addition to uploading images alongside galley files you can also:

- Replace the galley if you've made changes to the original file.
- Upload a CSS file to go along with the galley.
- Change the XSLT file used to render the galley.
- View the galley's history or delete it.

2.5.4 Completing Typesetting

Once you have uploaded the required galleys and their files you will notice a new Note to Editor box has appeared in the Notes section, you can use this to complete your task.

Once you have marked it as complete the card will move into the Completed column.

2.5.5 Typesetting Plugin (New!)

The Typesetting plugin is the new workflow used in Janeway for typesetting. It is currently deployed as a plugin but we intend to replace the above process with this new system in the near future.

With this new plugin, we aim to simplify the process of working on corrections for the typesetter with a brand new interface that is used both when uploading the initial typesetting files as well as when working on corrections. The summary of improvements includes:

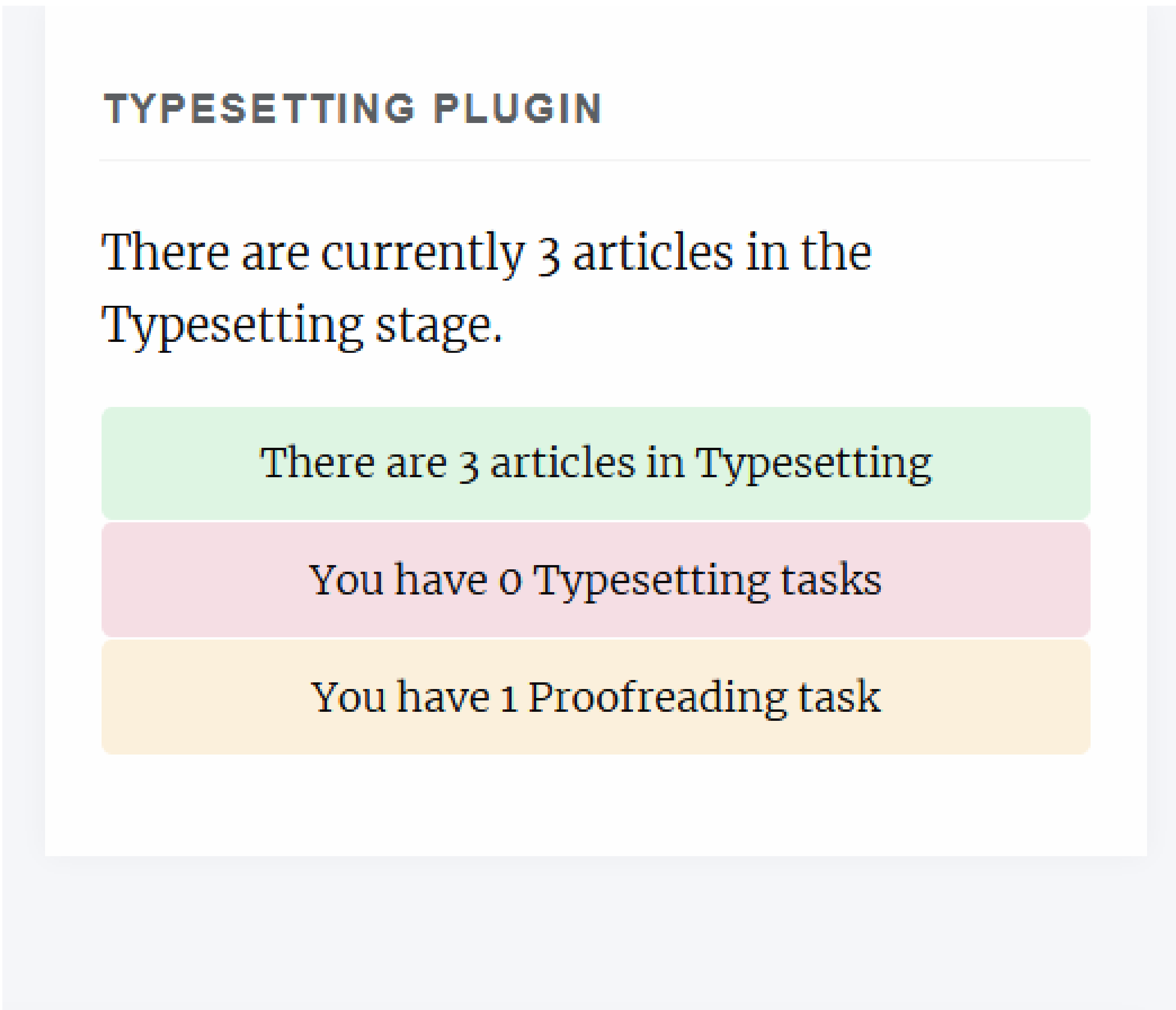
- Unified interface for all typesetting tasks
- Better and more complete display of the article metadata
- Error detection warnings: Incomplete corrections, missing figure files, missing metadata…
- Full display of the proofreading comments and corrections requested
- Single input form for uploading galley files

On your dashboard, there should be a card indicating the number of typesetting tasks that are currently awaiting for you to complete:

When uploading a new Galley (now referred to as 'Typeset Files'), there is now a single button interface where the typesetter uploads a file and gives it an optional label. Janeway will use the best label for the file provided, but typesetters can edit the label to add a different one if necessary.

2.5.5.1 Image Files

When a typeset file in the XML or HTML format is uploaded that has image links Janeway will detect them and prompt the typesetter to upload them. Image filenames should match those within the XML or HTML.


TYPESETTING PLUGIN
There are currently 3 articles in the Typesetting stage.
There are 3 articles in Typesetting
You have 0 Typesetting tasks
You have 1 Proofreading task

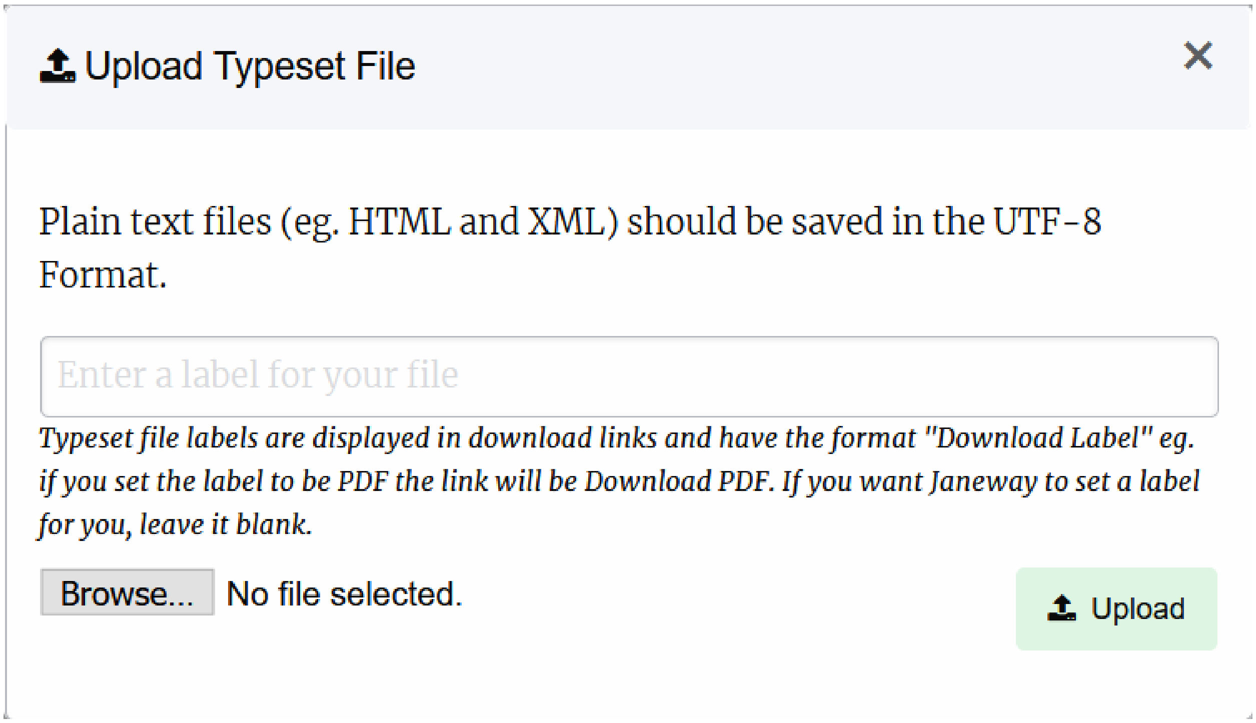
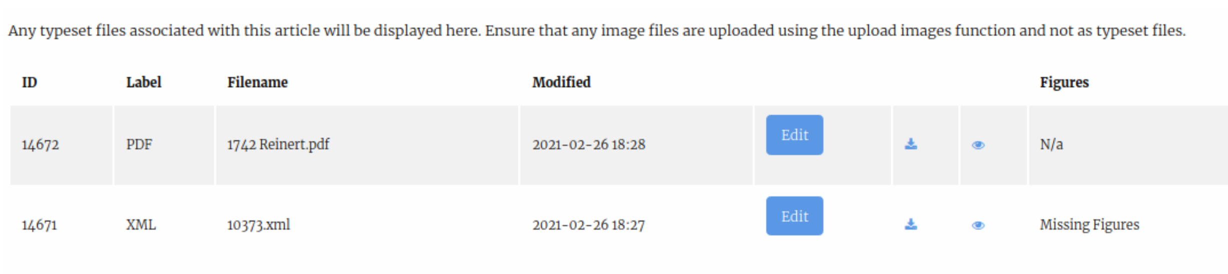
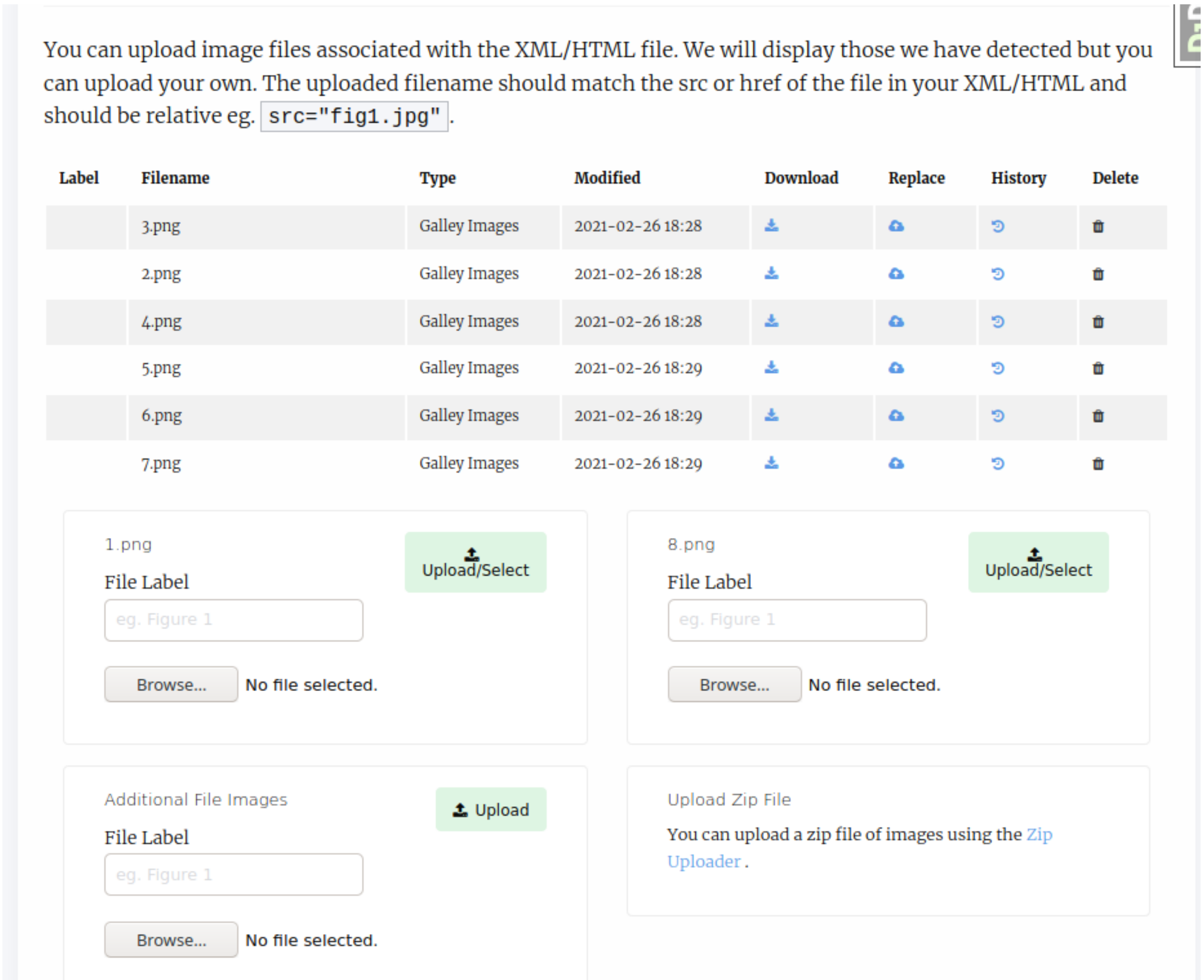


Fig. 45: Screenshot of the new file upload box


Any typeset files associated with this article will be displayed here. Ensure that any image files are uploaded using the upload images function and not as typeset files.

ID	Label	Filename	Modified				Figures
14672	PDF	1742 Reinert.pdf	2021-02-26 18:28	Edit			N/a
14671	XML	10373.xml	2021-02-26 18:27	Edit			Missing Figures

At this point, press the edit button and upload each image on the box matching the filename from the XML/HTML file:



If an XML or HTML file has a large number of images it is often faster to use the zip uploader. Create a .zip archive file and within it place each of the image files. The image filename must match the link in the typeset file otherwise it will not import them.

2.5.5.2 Source Files

If any intermiadate files have been used for the production of the Files (such as Adobe In Design files), they can be uploaded under the 'Source Files' section

2.5.5.3 Finishing Up

Before you can complete the task, Janeway will warn you of any potential problems it detects with your files, such as potential missing images on the XML/HTML files or Typeset Files that have not yet been corrected.

Once you are done with the typesetting or correction task, you can leave a note for the editor and complete it for the editor to review.

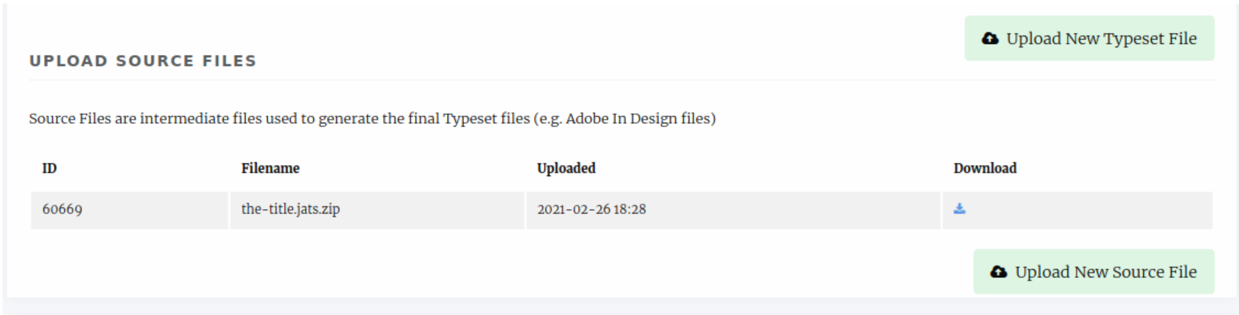
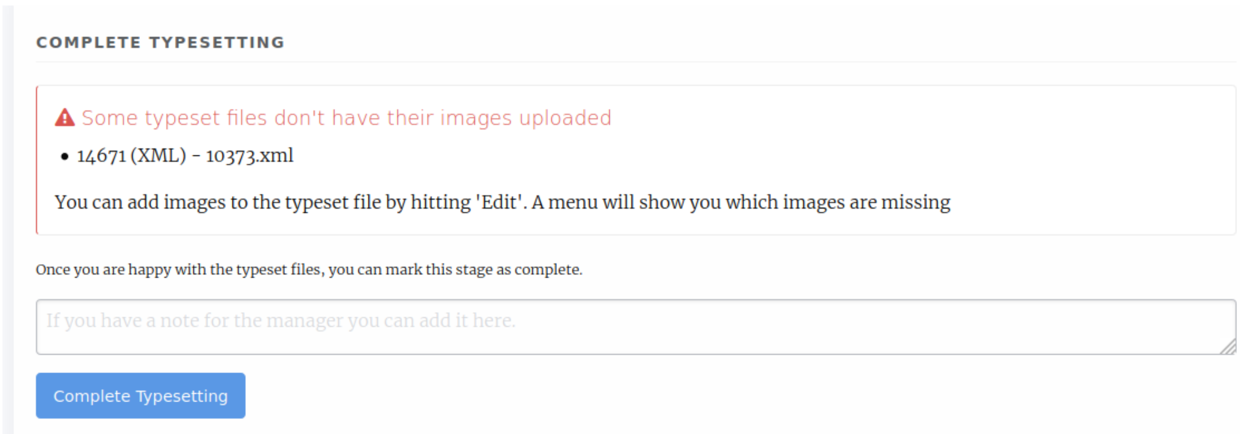


Fig. 46: Screenshot of the source files form



2.6 Proofreader Guide

As a proofreader you may be assigned proofing tasks for a paper. When a new assignment is made you will receive and email and be able to see the requests from the journal dashboard. The list of potential proofreaders for a paper is made up of:

- Authors of the paper
- Editors
- Users with the Proofreader role

From the dashboard you will be able to see a list of New, In Progress and Completed proofing requests. Once you have accepted a new task you can use the View button to begin proofing.

Tip: Hover over the initials/pictures to see the names and roles of those involved in the paper. PM means Proofing Manager

2.6.1 Proofing Task

The proofing task page is broken down into three sections

- Task Definition
- Galleys

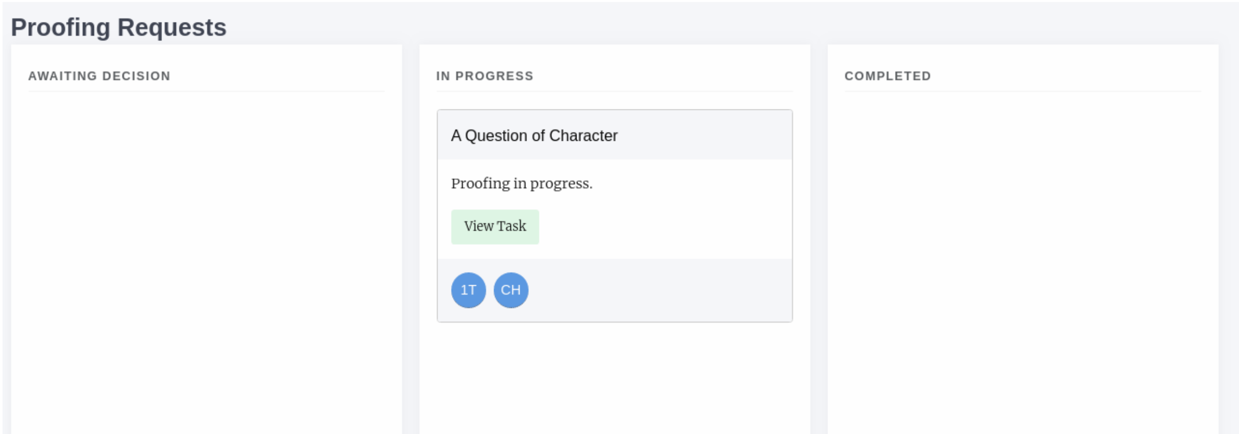


Fig. 47: A proofing task that has been accepted

- File Upload

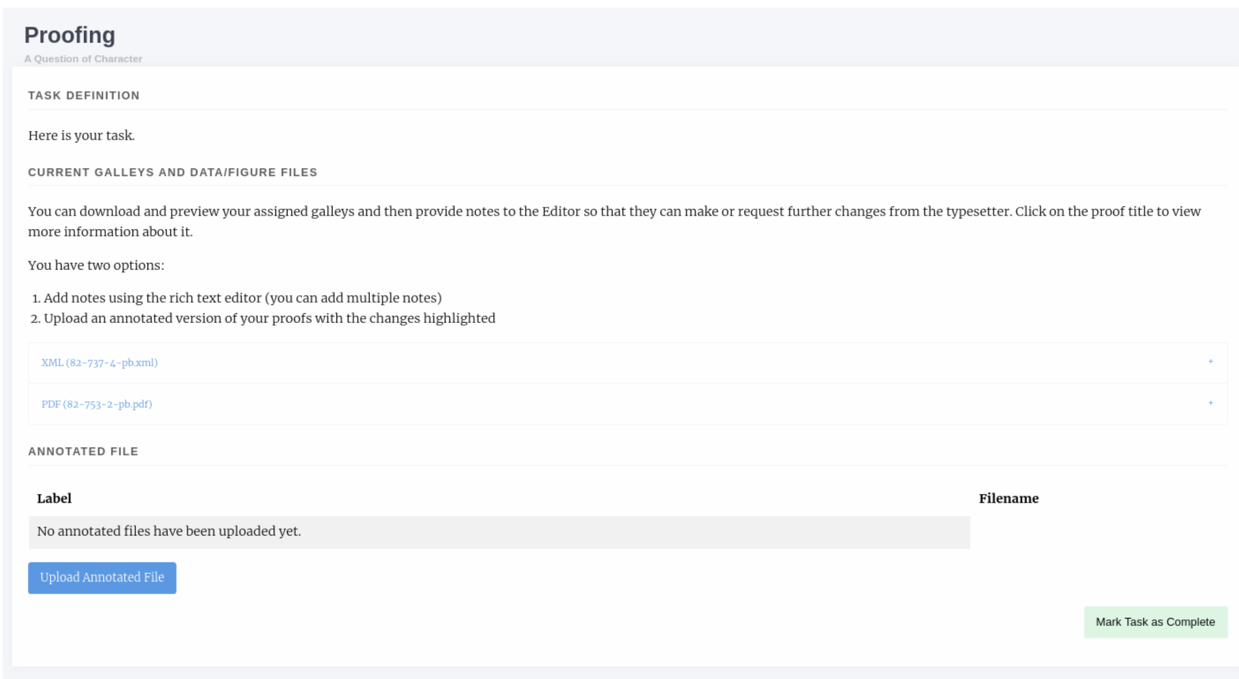


Fig. 48: A proofing task that has been accepted

2.6.1.1 Task Definition

The task definition is a note written by the Proofing Manager when they create the proofing task.

2.6.1.2 Galleys

This section lists the galleys that the Proofing Manager has assigned you. Common galley types are:

- PDF

- HTML
- XML

For HTML and XML galleys Janeway has a preview button that will render the galley into a viewable block so you don't need to understand the underlying markup to proof them.

Each of the Galleys has an accordian-type drop down so if you click on its name you will see a new section appear with more information.

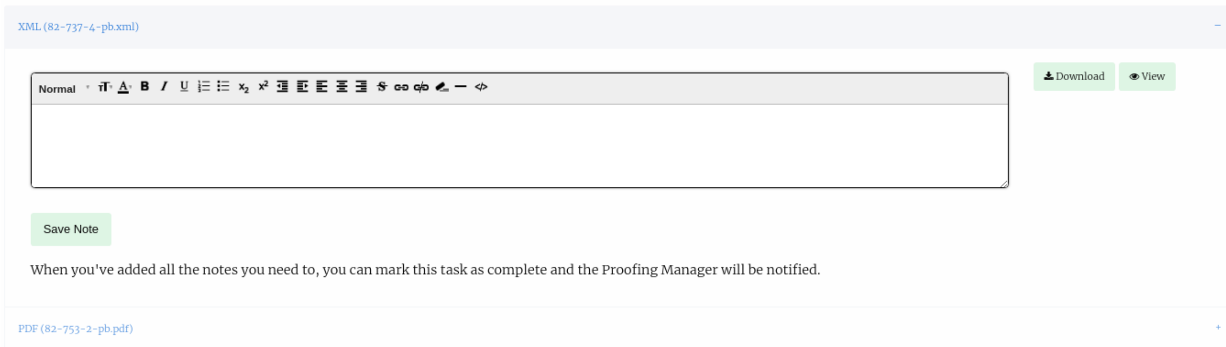


Fig. 49: An XML galley expanded

You now have the option to Download or View the galley, this will open in a new tab in your browser. You can then use the notes box to write notes on the galley file.

Tip: You can write as many notes as you like, press Save Note to create a new one and the box will reset.

In addition you can download and annotate the galley documents and then upload them again if you require.

When you have proofed *all* of the galley files you can mark the task as complete, it will be moved to the completed task list.

CHAPTER 3

Manager

Note: In version 1.4 the some of the buttons in the Manager interface have been rearranged.

3.1 Journal Settings

In journal settings, you can set basic information about the journal, configure home page elements, upload logos and banner images, and adjust some display elements.

If you have the Janeway role Editor or Staff, you can access Journal Settings by selecting **Manager** under **Staff**.

3.1.1 General

The general journal settings page is home to various configuration settings for the journal. Each field is explained in Janeway.

- Journal information (title, ISSN, description, keywords, design theme)
- Publisher information (name, website, contact)
- Remote website settings
- Language settings
- Integration with Slack or Discord

3.1.2 Home Page

Here you can activate features for your journal home page.

To add a homepage element, select **Add** under **Add Home Page Features** and then select **configure** to see options for that element. You can reorder elements by dragging and dropping them.

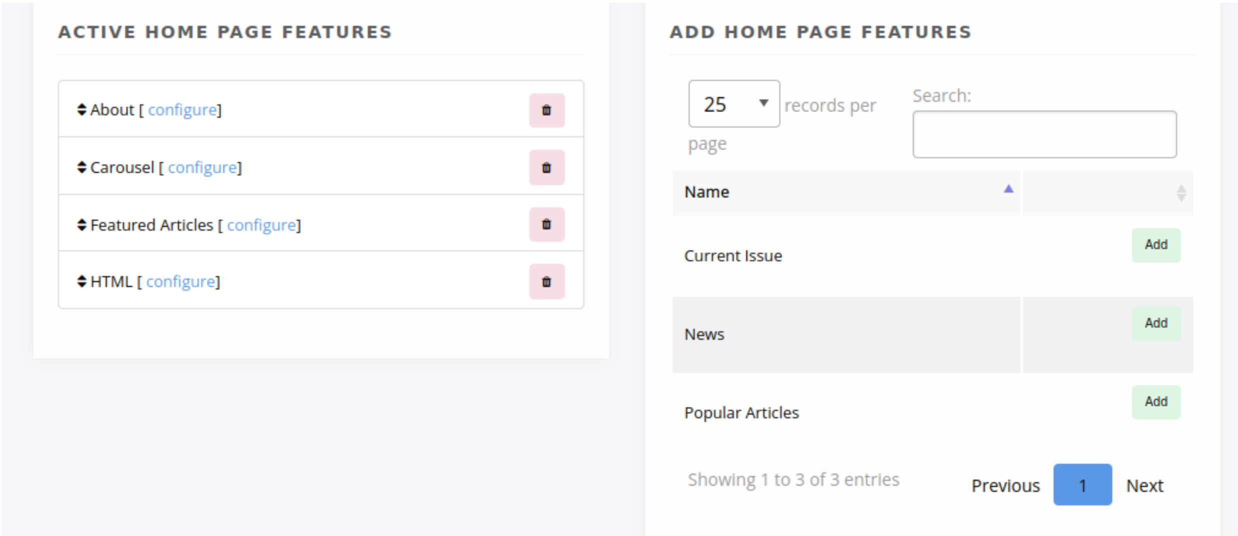


Fig. 1: The Journal Home Settings page

About Displays the journal description. If you edit the description here, it will also change in the other places it appears.

Carousel A rotating banner that can be configured to display one of the following:

- Latest articles
- Latest news
- A combonation of both

You can select the number of items to display as well as select the items you want to include or exclude.

Current Issue Takes whichever issue is marked as current and displays its table of contents on the home page. To learn how to select a current issue check the *issue page*.

Featured Articles Allows you to select a series of articles to display on the homepage. The selected articles are displayed in a grid that will cascade onto a new line every three articles.

HTML A generic segment that you can customize according to your needs. It can hold text as well as more complex HTML such as a Twitter timeline.

News Displays a list of the most recent news items. You can configure the number of items to display (the default is 5).

Popular Articles Displays the most-accessed articles. You can configure the number of items as well as how recent the articles should be.

3.1.3 Images

Below are explanations of the fields you see in Settings. See also the *Styling section*.

Tip: Janeway will automatically resize images to fit the designated spots it has for them, but it won't change the proportions of width to height.

Header image Typically the journal logo goes here. It appears in the top left corner on desktop or laptop screens, and at the top of the page on mobile devices.

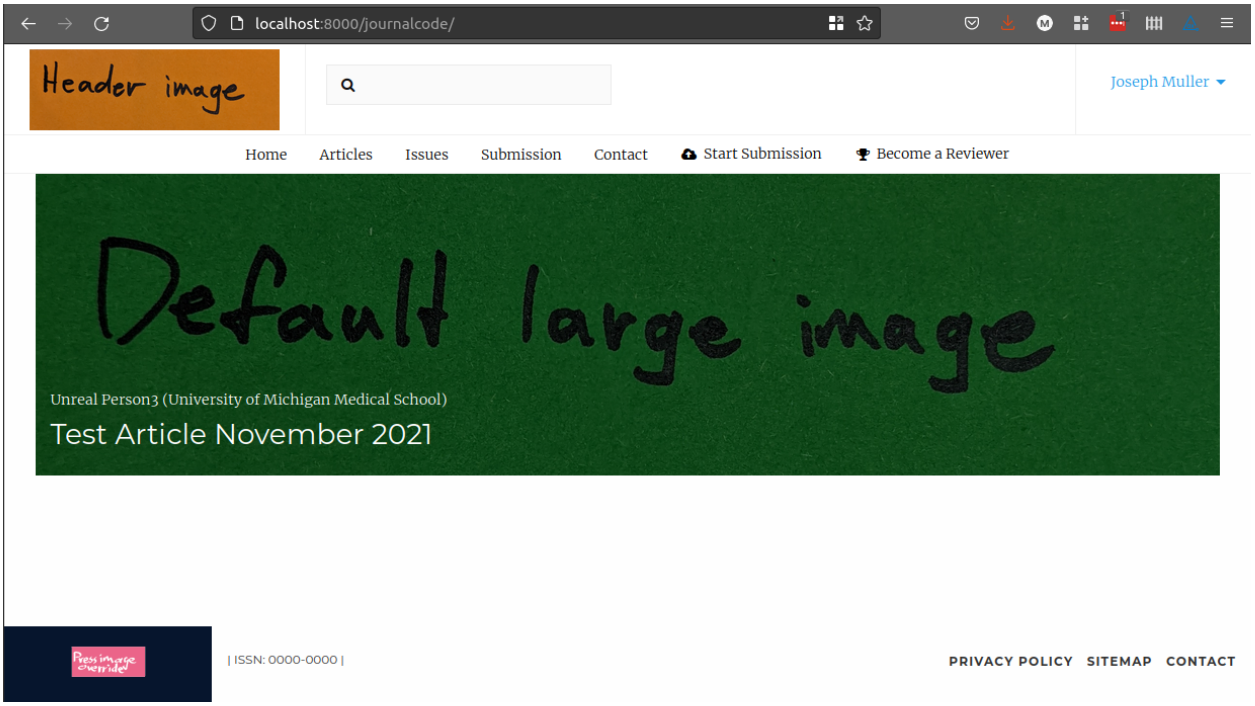


Fig. 2: Header image in top left and large image in center, with OLH theme

Default large image This image shows up in several places, depending on how your theme and home page are configured:

- At the top of the article page if no article image is set specifically (see Article Images Manager) and article images are set to display (see Article Display Settings). If not set *and* article images are set to display, article metadata may not show up properly.
- In the carousel on the home page for any items that don't have associated images. (In this spot it replaces the press-level "Default carousel image")

Use a wide image (about 4 parts width to 1 part height) with good resolution when set at 300 or 400 pixels tall.

Press override image This can be set to replace the press logo that appears in the footer when using the OLH theme or the clean theme.

Default cover image The default image for issue covers when no image is set specifically for that issue.

Default thumbnail The default image for each article when viewing an article list. A width-to-height ratio of about 3 to 4 is recommended. If no thumbnail is set, this defaults to the Janeway logo.

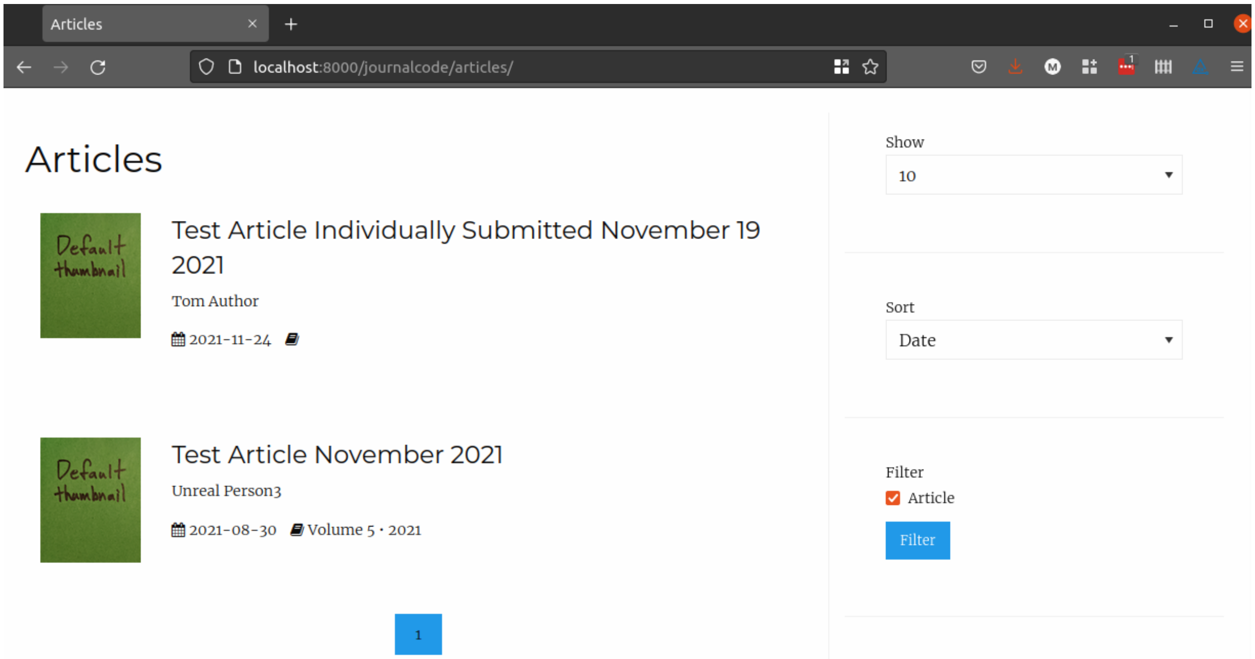
Favicon The tiny little image you often see in the browser tab before the name of a webpage. Use a very small image of equal width and height. If not set, no Favicon will appear.

3.1.4 Styling

This page displays some general settings for controlling the styling of your journal.

- Full Width Nav (only used by the Material theme)
- Display Editorial Team Images
- Enable Multi Page Editorial Team (splits the editorial team into pages by Group)


Issues
Default cover image
Volume 5 · 2021
1 items



3.1.5 All Settings

The all settings page lists every under-lying journal-level setting within Janeway and allows you to edit them. The setting groups are:

- Crossref
- Email
- Email Subject
- General
- Identifiers
- Preprints
- Review

This is a fallback area for editing a setting when you can't find it in the interface or for editing settings introduced into your instance.

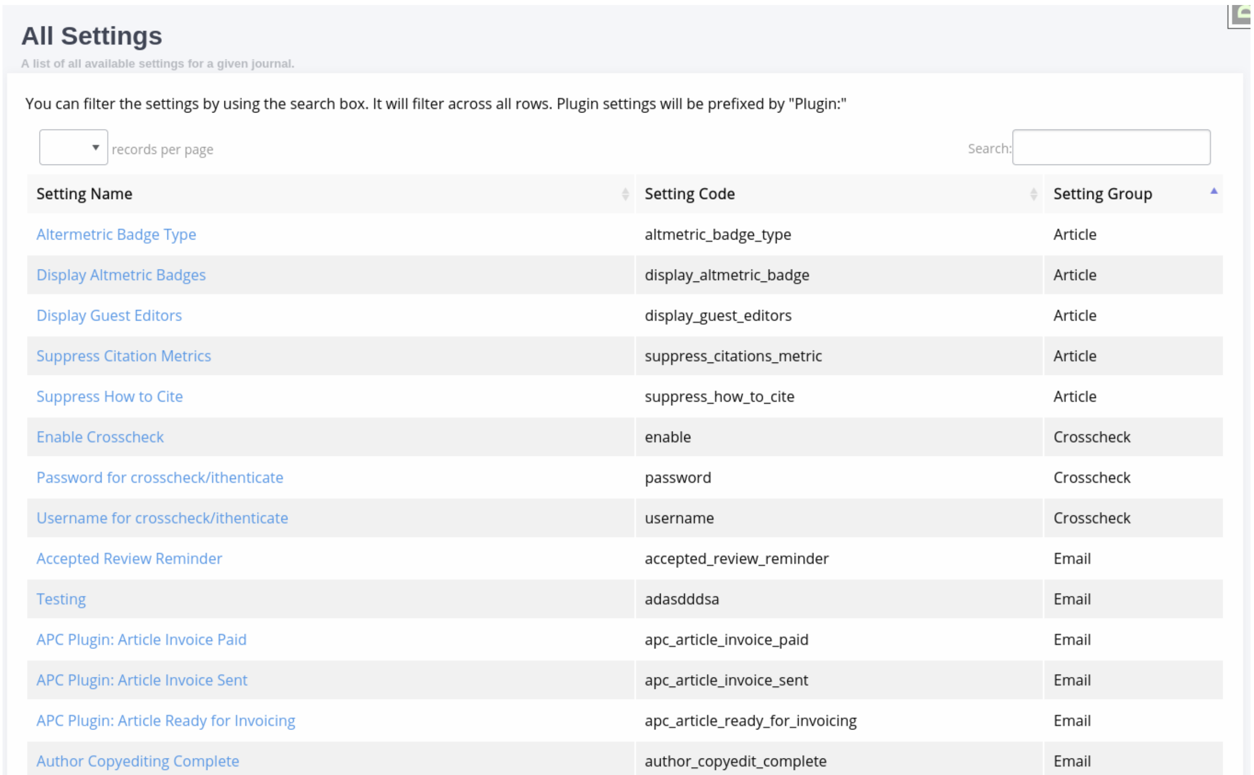
3.1.6 Accessing Settings in Templates and Code

Setting values can be accessed inside templates using **{{ journal_settings.group_name.setting_name }}**:

```
{{ journal_settings.crosscheck.enable_crosscheck }}
```

In Django they can be accessed with **get_setting**:

```
request.journal.get_setting('group_name', 'setting_name')
```



All Settings

A list of all available settings for a given journal.

You can filter the settings by using the search box. It will filter across all rows. Plugin settings will be prefixed by "Plugin:"

records per page

Search:

Setting Name	Setting Code	Setting Group
Altermetric Badge Type	altmetric_badge_type	Article
Display Altmetric Badges	display_altmetric_badge	Article
Display Guest Editors	display_guest_editors	Article
Suppress Citation Metrics	suppress_citations_metric	Article
Suppress How to Cite	suppress_how_to_cite	Article
Enable Crosscheck	enable	Crosscheck
Password for crosscheck/ithenticate	password	Crosscheck
Username for crosscheck/ithenticate	username	Crosscheck
Accepted Review Reminder	accepted_review_reminder	Email
Testing	adasdddsa	Email
APC Plugin: Article Invoice Paid	apc_article_invoice_paid	Email
APC Plugin: Article Invoice Sent	apc_article_invoice_sent	Email
APC Plugin: Article Ready for Invoicing	apc_article_ready_for_invoicing	Email
Author Copyediting Complete	author_copyedit_complete	Email

3.2 Review

The management interface has two sections that allow you to manage peer review settings for journals.

- Review Settings
- Review Forms

3.2.1 Review Settings

Under review settings we can control how peer review operates for the given journal. The settings editable here are:

- **Review Guidelines**
  - A set of generic review guidelines that a reviewer should follow.
- **Default Review Visibility**
  - Either Open, Blind or Double Blind, this is the default information visibility for a review assignment. If open, authors can see reviewers and vice versa, if blind reviewers can see authors, if double blind neither can see information on the other. When using double blind the editor must ensure the manuscript files are anonymous.
- **Default Review Days**
  - The default number of days a reviewer is given, this is used to then control reminders. This field is set to 56 days (8 weeks) initially. The due date can be changed on a per review basis.
- **One Click Access**

  - If enabled a special access token is appended to the reviewer link in the assignment email, this link allows the reviewer to view the review without logging into the system. Once the review is complete the token is deleted so it cannot be reused. Tokens are UUID4s which are unique.

- **Draft Decisions**
  - If enabled, section editors will not be able to accept papers, instead they can make recommendations to senior editors who can then accept papers.

- **Default Review Form**
  - The default review form that will be automatically selected when assigning a reviewer.

- **Reviewer Form Download**
  - If enabled this allows the Reviewer to download a copy of the review form in DOCX format to complete offline and then upload.

- **Enable save review progress**
  - If enabled, reviewers will be able to save the progress in a peer-review assignment and come back later to complete it later (Only recommended for journals using custom review forms that are particularly long)

- **Enable Peer Review Data Block**
  - When this setting is enabled authors will have access to view more information about the reviews for their article (requested, due, and complete dates). If it is left off they will only have access to the review comments.

- **Accept Article Warning**
  - This is a block of text displayed to the editor before they accept an article, prompting initial DOI and metadata registration with Crossref if the journal or press is set to use Crossref. You can use the setting to provide a readout of current metadata so the editor can do a quick check of what will be sent to Crossref. To show registration information, populate the setting with `{{ article.registration_preview|safe }}`

3.2.2 Review Forms

Janeway allows you to generate as many review forms as you like. When a new journal is created a default review form is generated automatically (called Default Form) it has one element: a text area called "Review".

To create a new form complete the form on the right:

- Form Name
- **Slug**
  - a version of the form name but in all lower-case, no spaces e.g. default-form
- **Intro**
  - Guidance text specific to this form
- **Thanks**
  - Text that is displayed after the reviewer has completed their review

Once you have created your new form you can add Fields known as Elements in Janeway by selecting the yellow edit button. Elements can be:

- Text Field
- Text Area

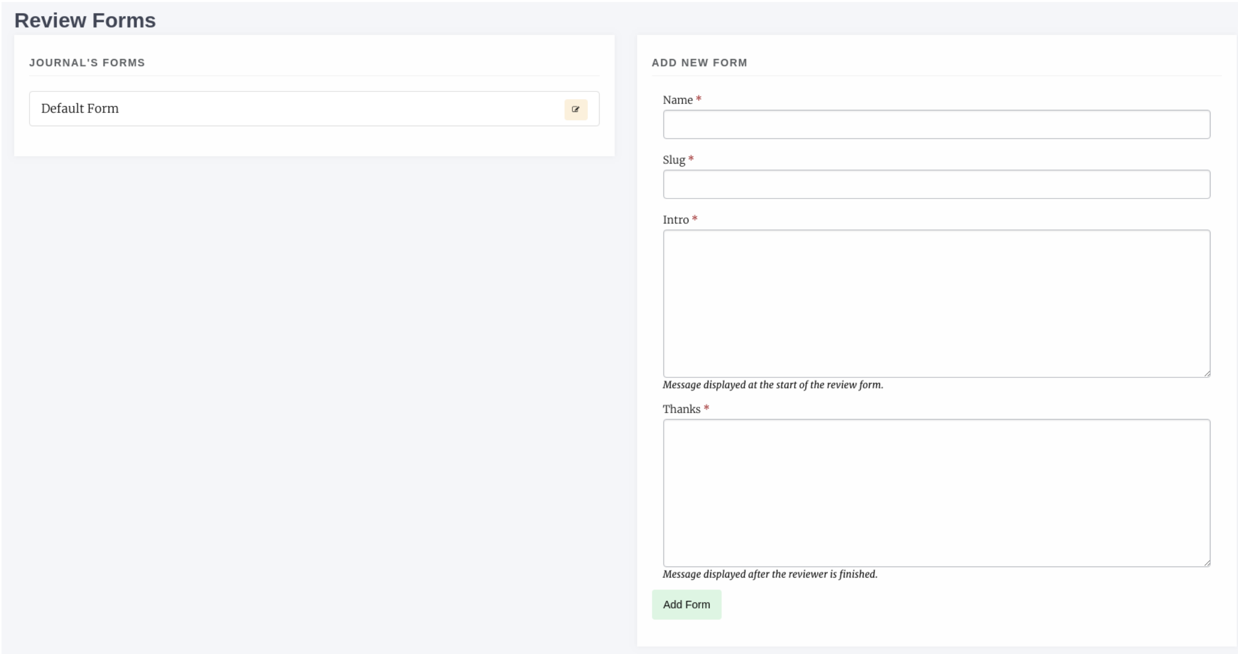


Fig. 3: Review Form interface

- Checkbox
- Select (dropdown)
- Email
- Upload
- Date

To add a new Element:

- Click Add Element
- **In the modal supply a name and kind**
  - If you choose "select" as kind you will need to add the options to the Choices field, these should be seperated by the bar "|" characted e.g. choice 1|choice 2|choice 2 or 1|2|3|4|5 if you wanted a numeric choice. If you select any other Kind, ignore the Choices field.
- **Required**
  - If this field MUST be completed, ensure this box is checked, if it is optional make sure it is not checked
- **Order**
  - The order in which this element will appear on the form
- **Width**
  - 1/3, 1/2 or Full width. If you put two half width elements next to each other in order they will both display on the same line
- **Help text**
  - This text will display under the Name field on the form and explain what the reviewer needs to do with this field.

- **Default visibility**
  - If enabled, by default this element will be visible to the reviewer once the Editor has approved the review for them to see. If disabled, the author will not see this element unless the Editor overrides the default setting.

As you go along you can use the Preview Form button to see what the form will look like. Here is an example of the default form edited to have two additional fields with 1/2 widths.

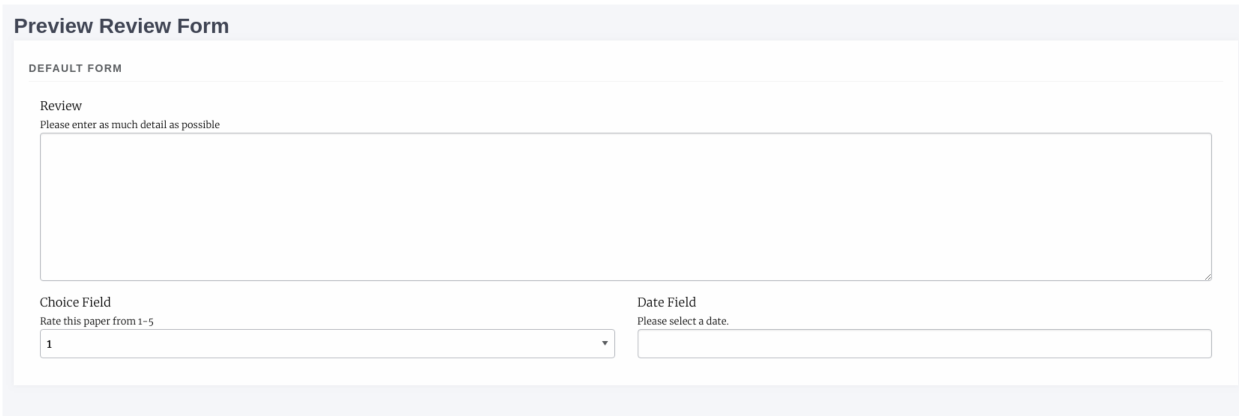


Fig. 4: Review Form preview

3.3 Submission

The management interface has three sections that allow you to manage submission settings for journals.

- Submission Settings
- Submission Fields Configurator
- Additional Submission Fields

3.3.1 Submission Settings

This section allows you to control generic submission settings that affect how submission is experienced.

- **Disable Journal Submission**
  - If checked, this setting disables the submission system.
- **Submission Intro Text**
  - Introductory text for the head of the Submission page.
- **Copyright Notice**
  - Copyright information for authors usually includes information on licenses used for publishing and rights retained.
- **Submission Checklist**
  - Usually a numeric list of items an author should check before submitting the paper.
- **Acceptance Criteria**

- The criteria the journal uses to evaluate your paper.

- **Publication Fees**
  - Any publication fees associated with submitting the paper.
- **Editors for Notification**
  - This allows you to select which Editors are notified of new papers being submitted.
- **User Automatically Author**
  - If enabled the submission system assumes the user submitting the paper is also an author, they can be removed if required.
- **Competing Interests**
  - This setting is deprecated in favour of the Submission Configurator version.
- **Submission Summary**
  - This setting will be moved to the submission configurator. If enabled, this asks for a lay summary of the paper to be submitted.
- **Accepts Preprint Submissions**
  - If preprints are enabled and this setting is enabled an author will be able to submit a preprint directly from the preprint service into the journal for evaluation.
- **Focus and Scope**
  - The journal's Focus and Scope, displayed on the Submissions page.
- **Publication Cycle**
  - The journal's publication schedule e.g. Yearly or Continuous, displayed on the Submissions page.
- **Peer Review Info**
  - Information on how peer-review is conducted, displayed on the Submissions page.
- **File Submission Guidelines**
  - General instructions for authors when they get to the file upload stage.
- **Manuscript File Submission Instructions**
  - Specific instructions for manuscripts, appearing on the manuscript upload pop-up.
- **Limit Manuscript Types**
  - If enabled, only Doc, Docx, RTF and ODT files will be accepted as manuscript files during submission
- **Data and Figure File Submission Instructions**
  - Specific instructions for figures and data files, appearing on the figure and data upload pop-up.

3.3.2 Submission Fields Configurator

The submission fields configurator lets you enable or disable submission fields. This page has three complexities:

- **Disabling License, Language or Section**
  - If you disable one of these fields you need to set a default value
- You can enable or disable almost all fields, except Title, Manuscript Files and Authors.

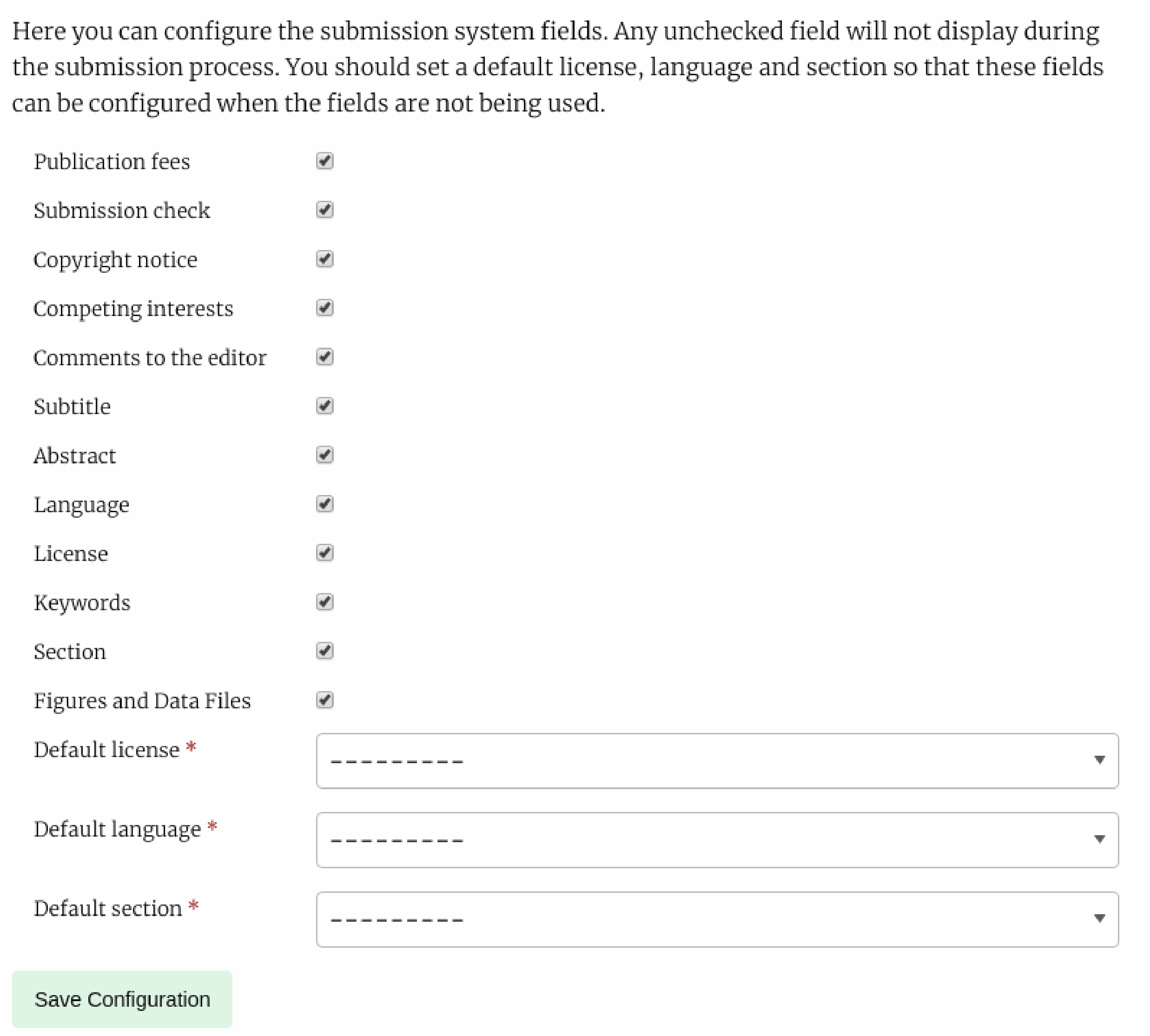


Fig. 5: Submission Fields Configurator

3.3.3 Additional Submission Fields

The additional submission fields page allows us to add custom fields to the Article Info submission page. It works in a similar fashion to the Review Forms generator.

Field types are:

- Text Field
- Text Area
- Checkbox
- Select (dropdown)
- Email
- Upload
- Date

To add a new Element:

- **In the form add Name and select a Kind**
  - If you choose "select" as kind you will need to add the options to the Choices field, these should be seperated by the bar "|" characted e.g. choice 1|choice 2|choice 2 or 1|2|3|4|5 if you wanted a numeric choice. If you select any other Kind, ignore the Choices field.
- **Required**
  - If this field MUST be completed, ensure this box is checked, if it is optional make sure it is not checked
- **Order**
  - The order in which this element will appear on the form
- **Width**
  - 1/3, 1/2 or Full width. If you put two half width elements next to each other in order they will both display on the same line
- **Help text**
  - This text will display under the Name field on the form and explain what the reviewer needs to do with this field.

3.4 Content

The content section allows us to control the navigation menu, content pages, news and editorial team in Janeway.

Note: In version 1.4 the content manager page has been redesigned and updated.

3.4.1 Content

The Content Manager is Janeway's CMS. Pages can be created an edited using our rich text editor.

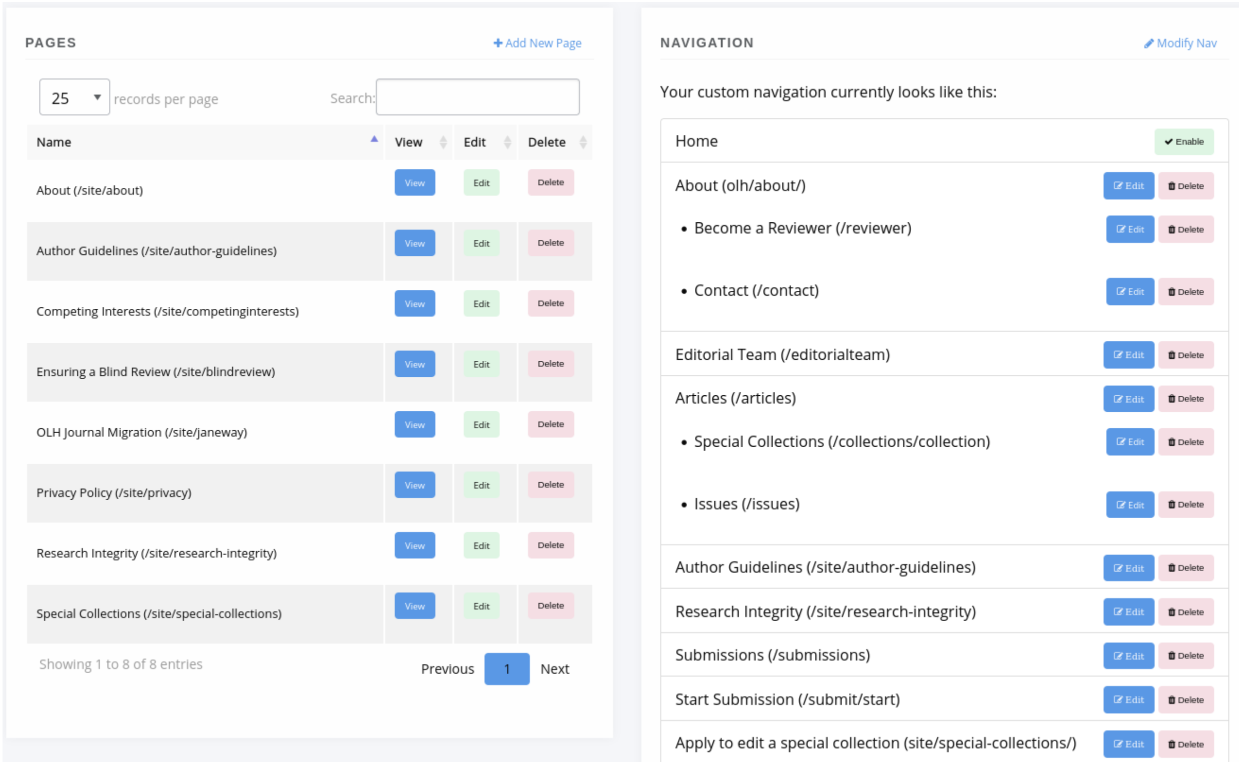


Fig. 6: Content and Navigation manager

3.4.1.1 Add a New Page

To add a new page to your journal select "+ Add New Page". A new page requires the following:

- **Name**
  - This is the name of the page for the URL bar e.g. privacy-policy or author-guidelines. This field should not have any spaces in it.
- **Display Name**
  - The proper name for the page that will be displayed in the navigation e.g. Privacy Policy or Author Guidelines
- **Content**
  - HTML content, you should avoid pasting in from a text editor like Word as it will copy random styling across that will ignore your stylesheets

Once a new page has been created you will find it is available at https://yoururl.com/site/name e.g. https://orbit.openlibhums.org/site/privacy

3.4.1.2 Edit a Page

From the Content page you can see a list of the pages currently on your journal. Select Edit to make changes.

3.4.1.3 Delete a Page

To delete a page use the red Delete button.

Warning: Data cannot be recovered so ensure you really want to remove a page before pressing the delete button.

3.4.1.4 Navigation

As of 1.3.2 Navigation is made up of:

- Fixed nav elements that can be turned on/off
- User generated navigation entries

The future intention is that all navigation will be handled via elements.

- **Fixed Nav Elements**
  - Home
  - News
  - Articles
  - Issues
  - Collections
  - Editorial Team
  - Submissions
  - Contact
  - Start Submission
  - Become a Reviewer

To add a new Navigation element: from the Content Manager page select "Edit Nav", the following elements are presented in the form:

- **Link name**
  - The display name for the link
- **Link**
  - The actual link, either local *site/privacy* or remote *https://www.google.com*
- **Is External**
  - If linking outside of your janeway install, this should be checked
- **Sequence**
  - Used to order your nav elements, it should be a positive integer (number)
- **Has sub navigation**
  - If this element is the first that has a drop down, check this
- **Top level nav item**
  - A list of elements that have "Has sub navigation" checked, if you select and item from here your new nav element will appear under the selected drop down

3.4.2 News Manager

The news manager allows you to create news items, assign display and take down dates and upload images to display alongside them.

News items can also displayed in the *carousel*.

To add a new news item select the *News Manager*. The interface displays exiting news items on the left and a form for adding new items on the right.

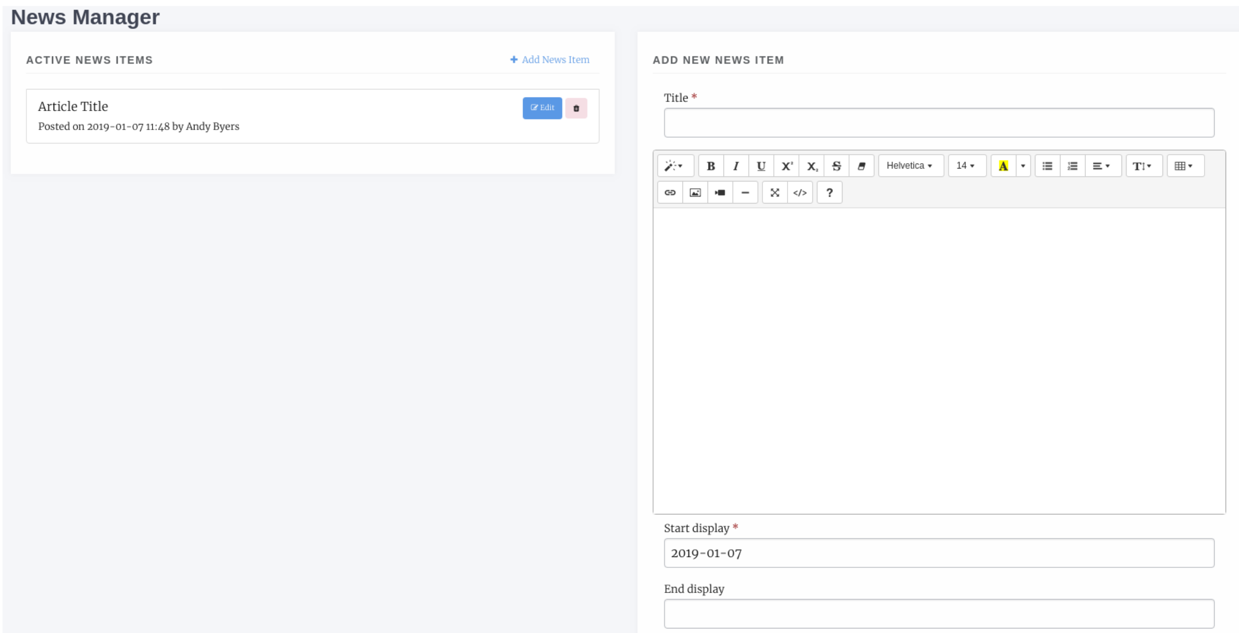


Fig. 7: News Manager interface

The form fields include:

- **Title ***
    - The title of the news item
- **Body ***
    - The HTML body of the news item
- **Start display ***
    - The date to start displaying this news item
- **End display**
    - The date to stop displaying this news item (can be left blank to display forever)
- **Sequence ***
    - Use for sorting when news items are posted on the same day
- **Image file**
    - An image file to fit the news piece, ensure you have the rights to post it
- **Custom Byline**
    - Lets you overwrite the name displayed as the originator of the news item

- **Tags**
  - A series of tags/keywords for the piece, you can filter news items by tags

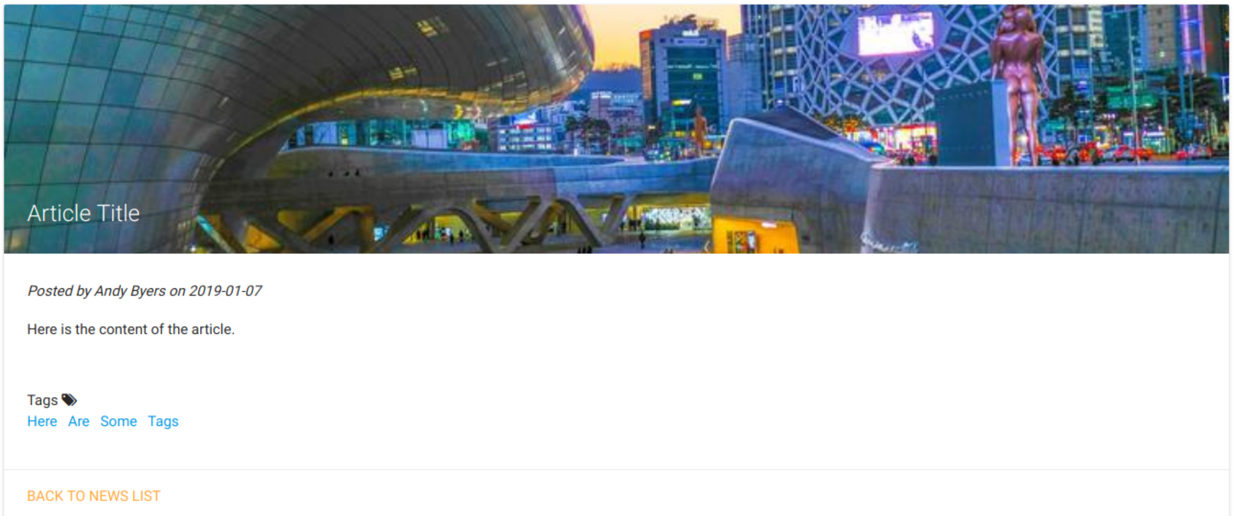


Fig. 8: A news item with image and tags, material theme

3.4.3 Journal Contacts

You can control the contacts listing for your journal by adding and removing contacts through this interface. Only three fields are used for this:

- **Name**
  - The contact's name
- **Email**
  - The email address that should be contacted
- **Role**
  - The contact's role e.g. Editor or Publisher

Each outgoing message is recorded in the database and can be viewed in the admin area by staff.

3.4.4 Editorial Team

The Editorial Team interface is relatively complex and is made up of:

- Editorial Groups
- Editorial Group Members

You can create as many groups as you like and add as many members as you like.

When you access the interface the form for making a new group is displayed on the right of the page and the existing groups listed on the left. For each group you can:

- Edit the membership
- Edit the group details

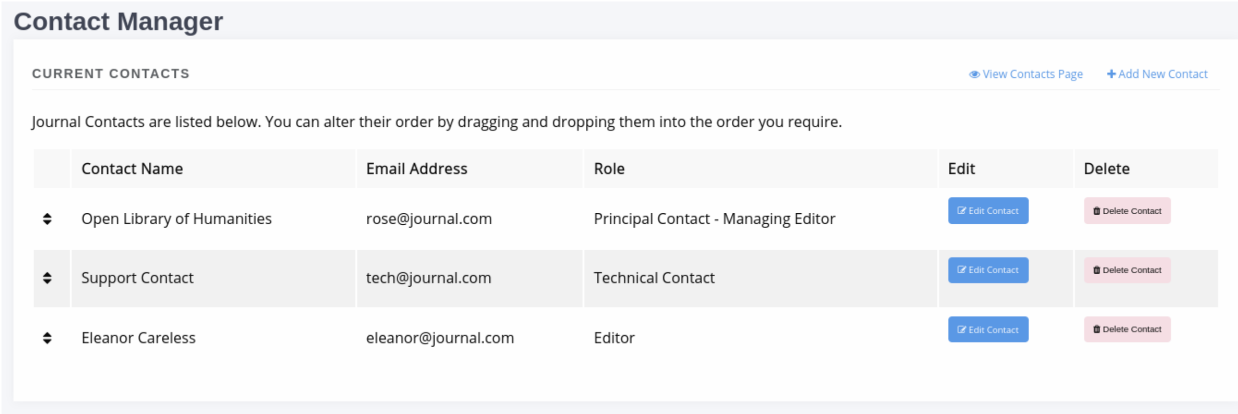


Fig. 9: Contact Manager interface. The sort handles indicate you can drag and drop to re-order your contacts.

- Delete the group
- Drag and drop to re-order them

Tip: As of version 1.4 the Group description field supports HTML and presents a rich-text editor. If you do not wish to add an account for each user you can simply list them in the rich text box using, for example, a bulleted list.

3.4.4.1 Adding a New Group

Creating a new group allows you to add members and display them on the Editorial Team page. Each group is headed by the group name you supply.

- **Name**
  - The group name e.g. Editoral Team or Advisors
- **Description**
  - Displayed under the Name header on the Editorial Team page
- **Sequence**
  - The order the groups should be displayed, you can reorder the groups by editing their sequence or by dragging and dropping their record

3.4.4.2 Adding Members to a Group

For an existing or newley created group you can use the Edit Members button (Green with a group of outlines) to change the membership of the group.

On the left is a list of the current members, you can:

- Delete a member from the group
- Reorder the members by dragging and dropping a listing

Journal users are listed on the right and you can add a user to the group using the *Add* button. If a user account does not exist for the user you can use the *Add New User* button to add them.

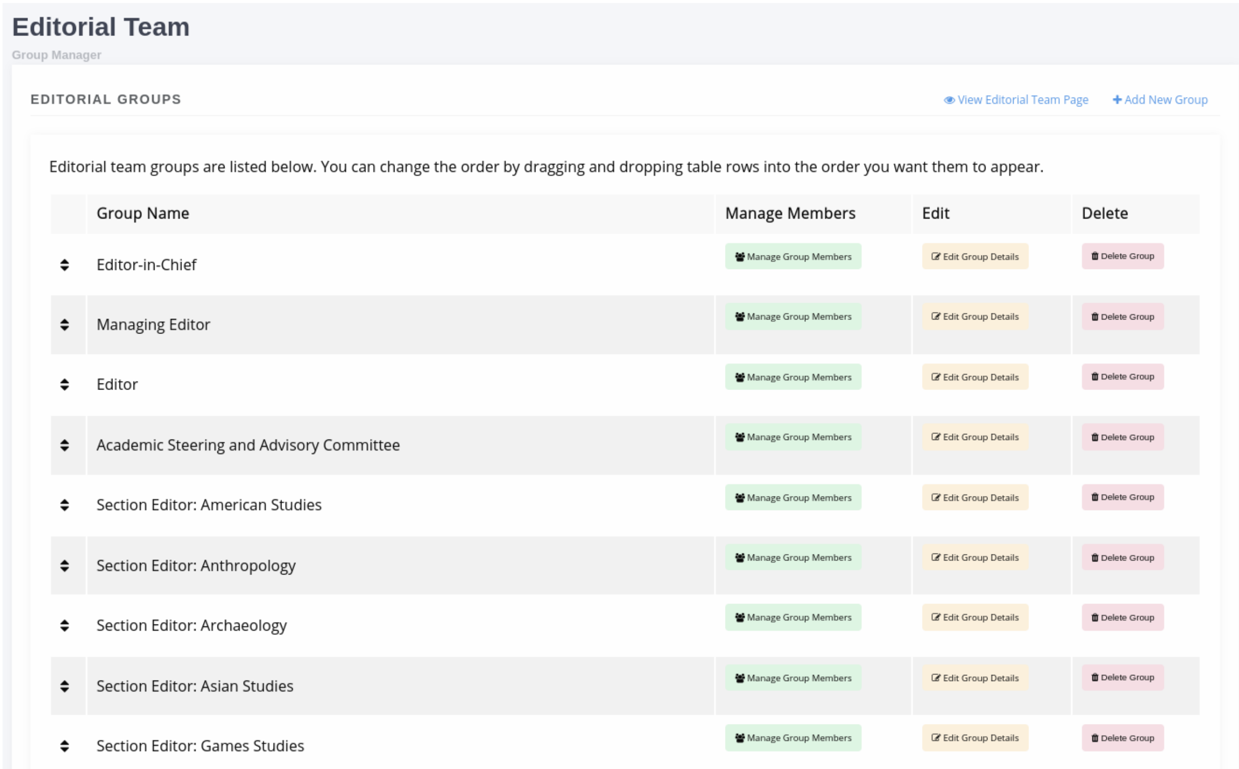


Fig. 10: The Editorial Team interface

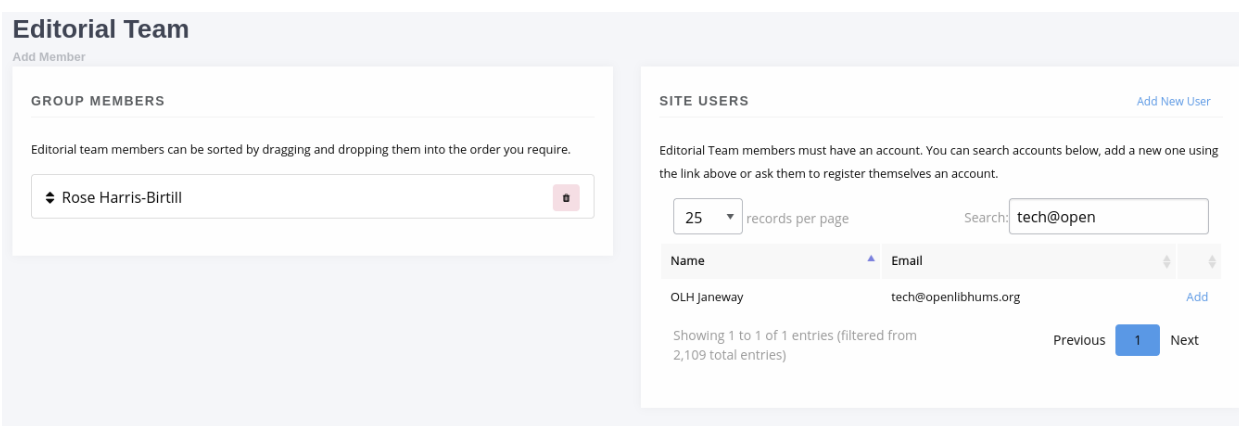


Fig. 11: An editorial team

3.4.5 Submission Page Items

A new addition to v1.4 the Submission Page Items system lets you totally customise the Submission page to your liking. The existing submission items have automatically been setup for you and can now be edited.

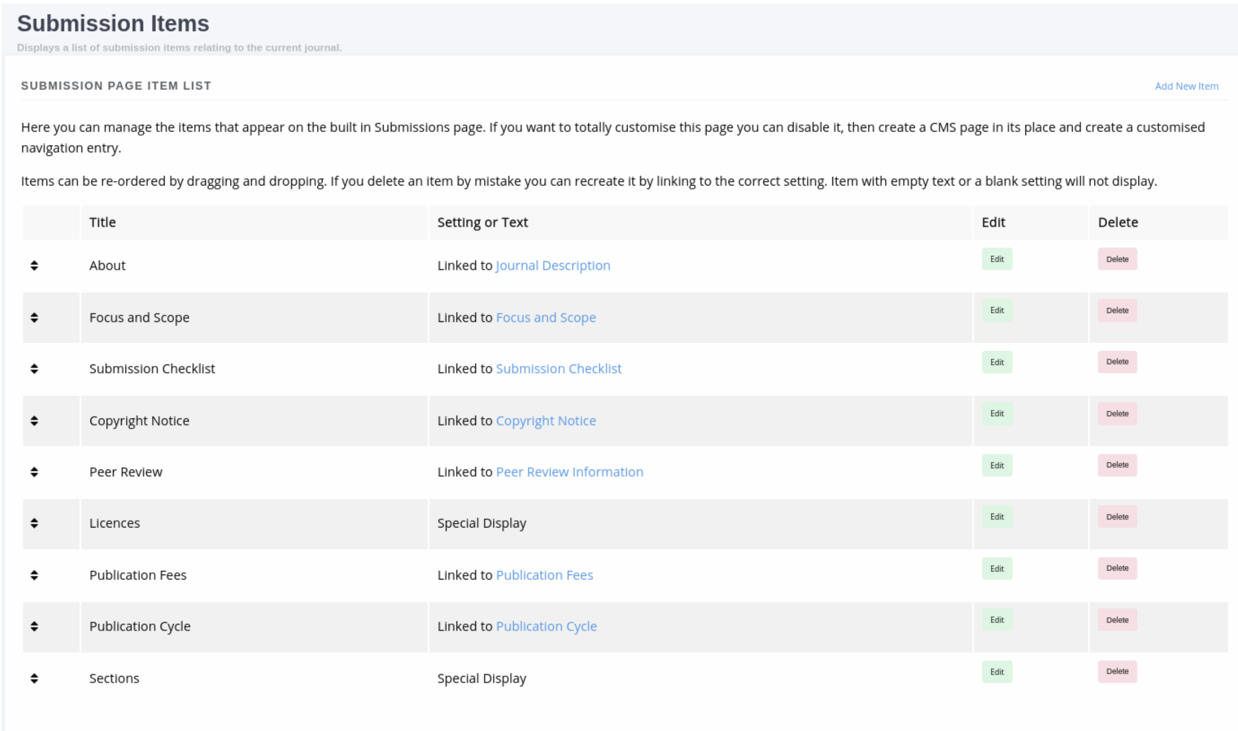


Fig. 12: List of default submission items generated in the v1.4 upgrade process.

You can manage submission items in three ways:

- Link to a setting
- Custom HTML
- Special Display

From the main screen you can add new, edit existing and delete items as well as re-order them by dragging and dropping rows of the table.

Fig. 13: List of default submission items generated in the v1.4 upgrade process.

3.4.5.1 Link to a Setting

You can opt to link a submission item to an existing setting so it will display the same content as that setting. This is currently used for the majority of the automatically generated submission page items. Some examples of this are:

- About
- Focus and Scope
- Submission Checklist

You can tell when a submission item is linked to a setting under the 'Setting or Text' column in the main table or the 'Existing setting' field being completed when editing a submission item.

3.4.5.2 Custom HTML

A submission item can also just have some custom HTML, you can fill out the 'Text' rich text box. When using the Text field you should not select an Existing Setting or this will take precedence when the page is rendered.

3.4.5.3 Special Display

Special Display settings are used to display Licenses and Sections on the Submission page. To add these blocks you need to set the title of the item to either:

- licenses

or

- sections

You must also leave 'Text' and 'Existing setting' blank. This will render a special template that displays all publicly available sections or licenses.

Media Files

The Media Files manager lets editors upload and host small files. Examples include:

- Author Guidelines
- Proofing Guidelines
- Article Submission Templates

Once a file is uploaded a link is provided that you can then insert into CMS pages or templates.

Note: The Media Files section should not be used to upload videos unless you have sufficient storage space/bandwidth. If you use Janeway Hosting you should contact the support team.

Fig. 14: Upload and deletion of a media file.

3.5 Articles and Issues

3.5.1 Article Display Settings

The Article Display Settings page has settings for controlling the way articles look and for deciding how metrics are displayed.

- Disable Article Images
- Display Guest Editors
- Suppress How to Cite
- View PDF Option

- Disable Metrics Display
- Suppress Citation Metrics

3.5.2 Article Images Manager

The article images manager pulls is an interface for editing all of the images for a given article.

- **Large Image File**
  - The large image is a file used in the heading of the article page on some themes. It is resized to 720x324 px upon uploading so it is recommended an image be either this size or larger. This image will also be used as the meta image if none is supplied and will be used on the carousel when Article display is enabled there.
- **Thumbnail**
  - The thumbnail is displayed on article listing pages like the All Articles list or the Issue Articles list,
- **Meta Image**
  - The meta image allows you to override the image displayed when the article is shared on social media. If no meta image is supplied the large image file is used.

Fig. 15: Example of large image file display

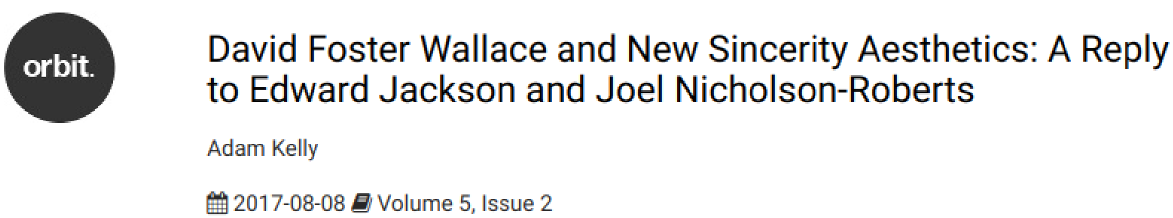


Fig. 16: Example of thumbnail display on the article listing page

3.5.3 Issue Manager

The issue manager lets you create, edit, delete and manage article records for issues.The main interface presents a list of your existing issue records with buttons to:

- Create a new issue
- Edit a given issue

Fig. 17: Example of a meta image on Twitter

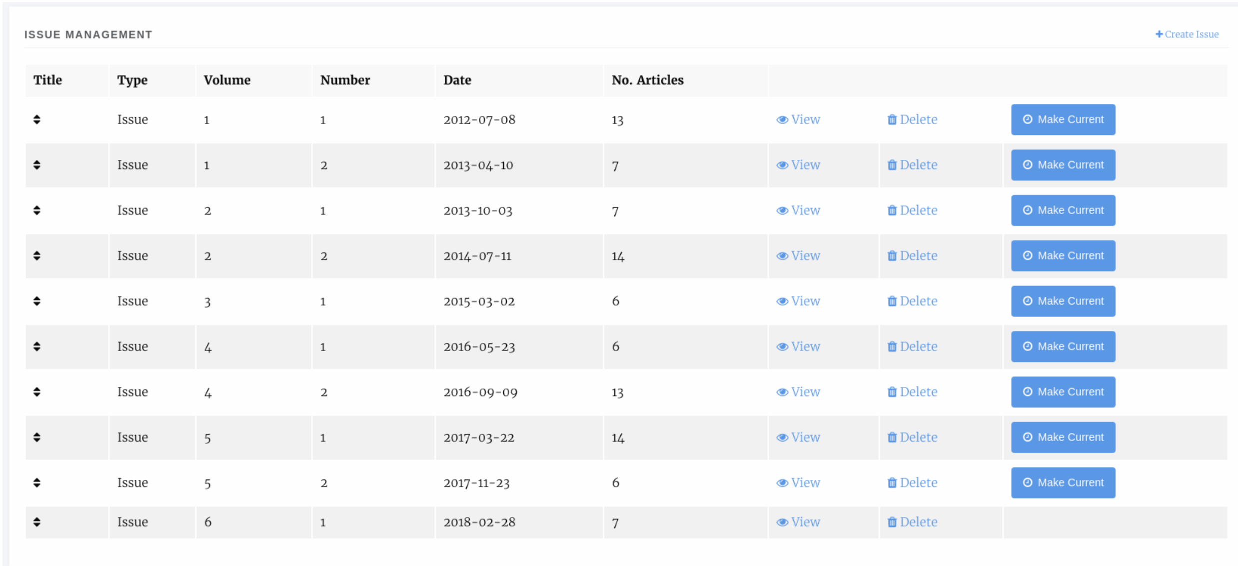
- Delete a given issue
- Mark an issue as Current

It also displays some basic data about the issues like date published and the number of articles in an issue.

3.5.3.1 Creating a New Issue or Collection

To create an issue select *Create Issue* in the top right and in the modal that appears you can complete the issue metadata.

- **Title**
  - Optional, a title for the issue.
- **Volume**
  - The volume number.
- **Issue**
  - The issue number.
- **Date**
  - The date published, if in the future the issue wont appear until the date published.
- **Cover Image**
  - The cover image, see example below.
- **Large Image**



ISSUE MANAGEMENT

+ Create Issue

Title	Type	Volume	Number	Date	No. Articles			
⬍	Issue	1	1	2012-07-08	13	View	Delete	Make Current
⬍	Issue	1	2	2013-04-10	7	View	Delete	Make Current
⬍	Issue	2	1	2013-10-03	7	View	Delete	Make Current
⬍	Issue	2	2	2014-07-11	14	View	Delete	Make Current
⬍	Issue	3	1	2015-03-02	6	View	Delete	Make Current
⬍	Issue	4	1	2016-05-23	6	View	Delete	Make Current
⬍	Issue	4	2	2016-09-09	13	View	Delete	Make Current
⬍	Issue	5	1	2017-03-22	14	View	Delete	Make Current
⬍	Issue	5	2	2017-11-23	6	View	Delete	Make Current
⬍	Issue	6	1	2018-02-28	7	View	Delete	

Fig. 18: Issue list

    – A large image file used at the head of the issue page, will be resized automatically but should be landscape.

- Description
- **Issue type**
    – Issues can be standard issues or can also be collections which are used to collect articles from across the journal into narratives.

3.5.3.2 Issue Articles

You can manage the article associated with a given issue by selecting the *View* option, the data of the issue will be displayed along with a list of articles grouped by section.

You can reorder the Section headers using the arrows Up and Down arrows on the right and you can re-order the articles within their sections by dragging and dropping them into the order you want. To add a new article into the issue select *Add Article* and select the article you want to add.

In addition, if the issue has guest editors you can add them using the Guest Editor manager at the bottom of the Issue page.

3.5.4 Article Sections

Note: Article Sections has been redesigned as part of version 1.4

Sections are ways of grouping articles by their content type e.g. "Research Articles" or "Reviews". From this interface you can edit the sections that are available on your journal.

For each section you can supply:

- Name

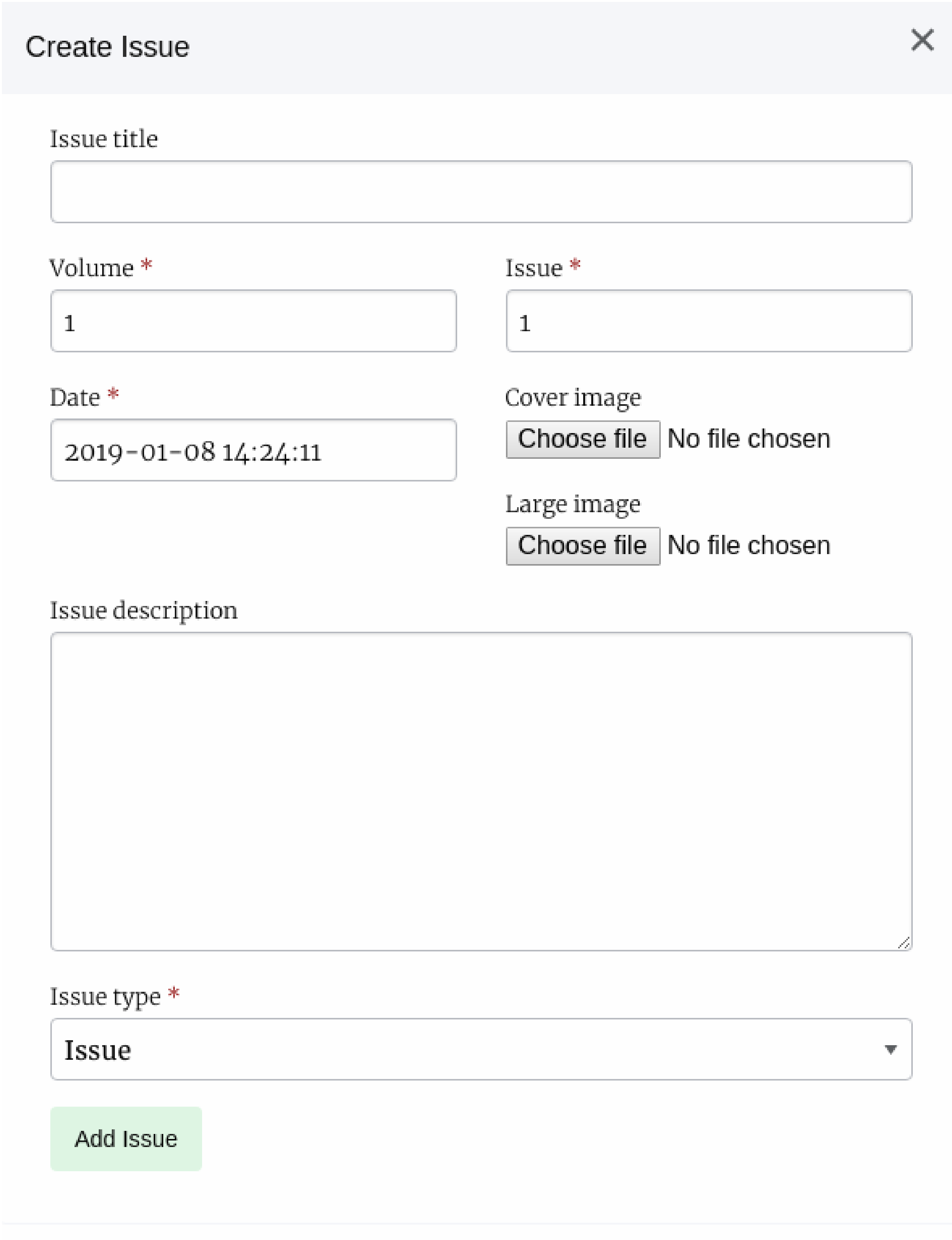


Fig. 19: New issue form

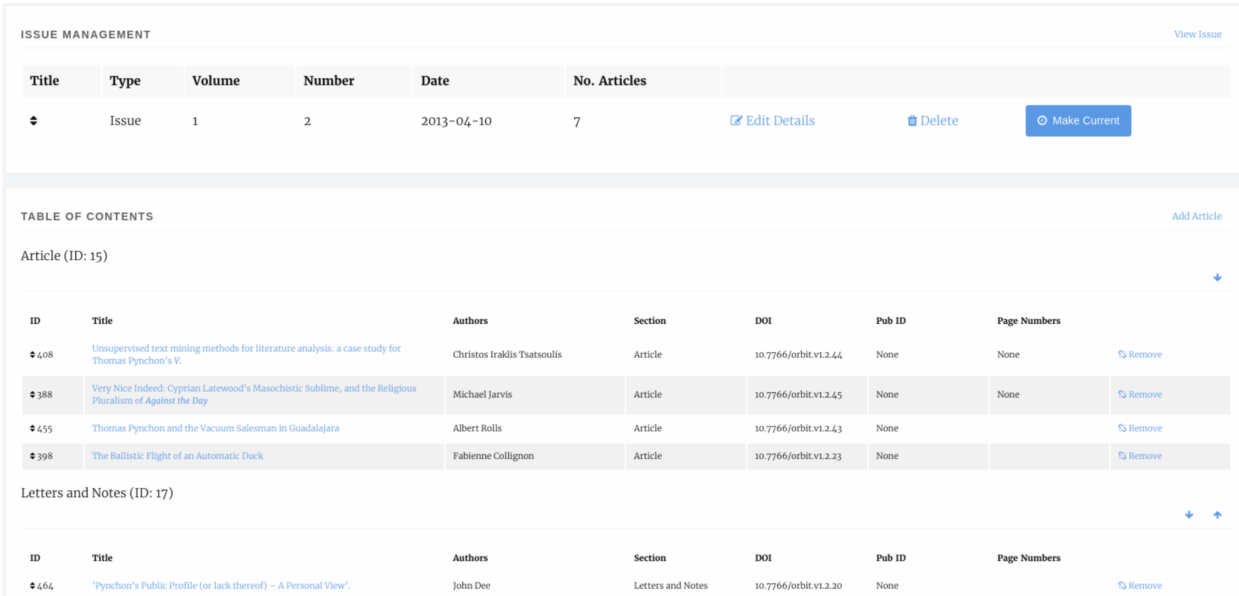


Fig. 20: An issue page

Fig. 21: Section Manager

- Plural name
- **Number of reviewers**
  - the number of reviewers generally require for this article type, may be 0 for "Editorials" etc.
- **Is filterable**
  - Whether this section should appear in the All Articles list filter options.
- **Sequence**
  - Order sections should appear in, can be changed using this field or by dragging and dropping.
- **Section editors**
  - The section editors for the section, they can be assigned to handle articles within thier section.
- **Editors**
  - Editors for this section will be notified when new papers are submitted into it.
- **Public submissions**
  - Checked if you want new submissions to be able to select this section.
- **Indexing**
  - Whether this section is put forward for indexing.
- **Auto assign editors**
  - Articles submitted to this section will be automatically assigned to any editors and/or section editors selected on the 'Editors' and/or 'Section Editors box above.

You can edit sections but you cannot delete a section when it would orphan an article. If you wish to remove a section first migrate all of the articles using that section to a different section then the delete button will become available.

This field can also be disabled if you only have one article type, using the Submission Configurator.

3.5.5 Licence Manager

The Licence manager allows you to define what licenses are available for submission to your journal. By default Janeway loads all of the CC 4.0 licence types and an All Rights Reserved type. You can edit the list to fit your journals needs.

Each licence can have the following:

- **Name**
  - Full name e.g. Creative Commons Attribution 4..
- **Short name**
  - A shortened name e.g. CC BY 4.0.
- **URL**
  - A URL to a description of the licence.
- **Text**
  - The text of the licence.
- **Order**
  - Order in which the licence should appear, can be set here or changed via drag and dropping the licences.
- **Available for Submission**
  - If checked, this licence will be available for selection during submission.

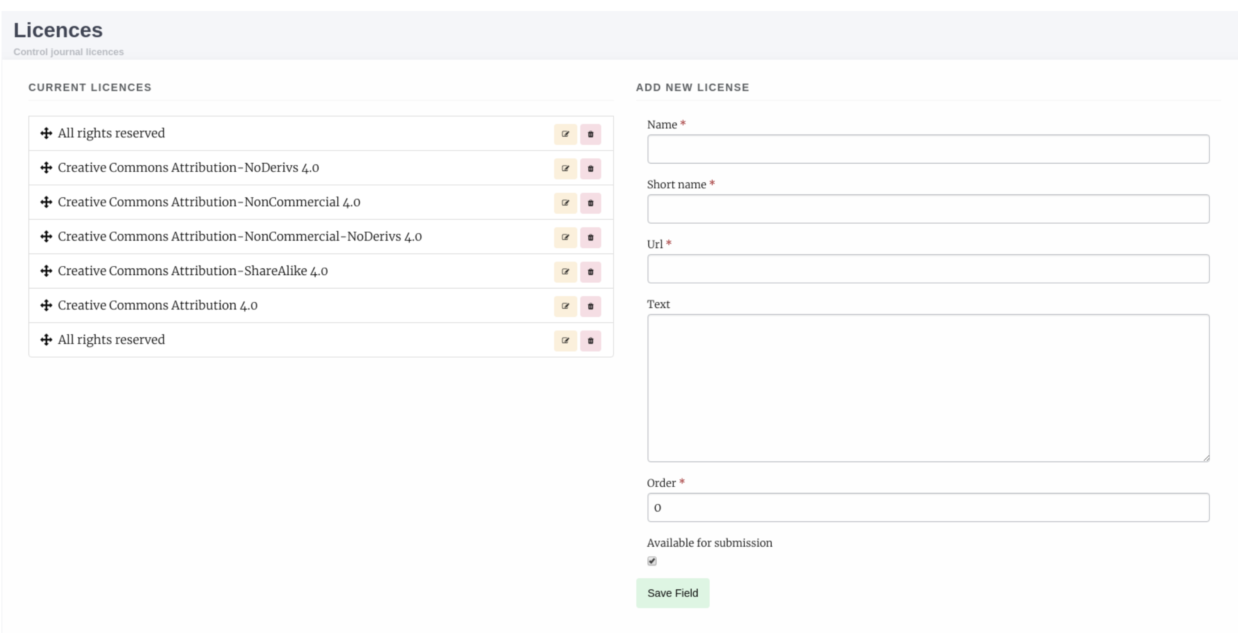


Fig. 22: Licence Manager

This field can also be disabled if you only have one licence type, using the Submission Configurator.

3.6 Crossref

3.6.1 Crossref Settings

Support for minting Crossref DOIs is built into Janeway's core. We will be expanding this to other providers in the future. To edit the Crossref settings select "Crossref Settings" from the manager interface. The fields are as follows:

- **Use Crossref**
  - If disabled, no DOIs will be minted
- **Crossref Test**
  - If enabled, DOIs will be minted on Crossref's test system
- **Crossref Username**
  - Your crossref username
- **Crossref Password**
  - Your crossref password
- **Crossref Email**
  - The email address of the depositor
- **Crossref Name**
  - The name of the depository
- **Crossref Prefix**
  - The prefix for your crossref account, usually 10.XXXX
- **Crossref Registrant**
  - The name of the registrant for this journal on Crossref's system eg. Open Library of Humanities
- **DOI Display Prefix**
  - Text to prepend to DOIs, this is used to generate DOI URLs
- **DOI Display Suffix**
  - Text to append to DOIs, this is also used to generate DOI URLs
- **DOI Pattern**
  - The pattern for the DOI, defaults to journal_code.article_id e.g. orbit.123

Minting DOIs is covered in Articles and Issues.

3.6.2 Crosscheck Settings

Janeway also has support for Crosscheck (also called Similarity Check) and is provided by iThenticate. You can sign up for an account via Crossref and this will allow you to send submitted manuscripts for originality checking.

The settings are:

- **Enable**
  - Enables display for Crosscheck buttons
- **Username**

    - Your iThenticate service username

- **Password**
    - Your iThenticate service password

More info on Crosscheck/Similarity Check: https://www.crossref.org/services/similarity-check/

3.7 Users

The Users section of the manager has various controls for different permission levels.

Editors have control of:

- Enrolled Users (users who have a role on your journal)
- Enrolling Users (giving users a role on your journal)
- Journal Roles (viewing users with a given role)

Staff have additional controls for:

- Inactive Users (users who have not activated their accounts)
- Authenticated Users (lists users with active sessions)
- Merge Users (available at the press level)

3.7.1 Enrolled Users

The journal users interface lists all users who have one or more roles on your journal. From this page we can:

- Edit a user
- Add new users
- Add multiple users to roles
- **View a user's assignment history**
    - Editorial assignments
    - Review assignments
    - Copyediting assignments
    - Production assignments

3.7.1.1 Editing a User

The edit user interface is relatively standard though there are a few things to note:

- Is staff should only be given to Journal Managers/Publishers and can only be assigned by other staff
- Is admin grants access to Janeway's admin data layer
- Is superuser will set a user to have all roles across the entire system

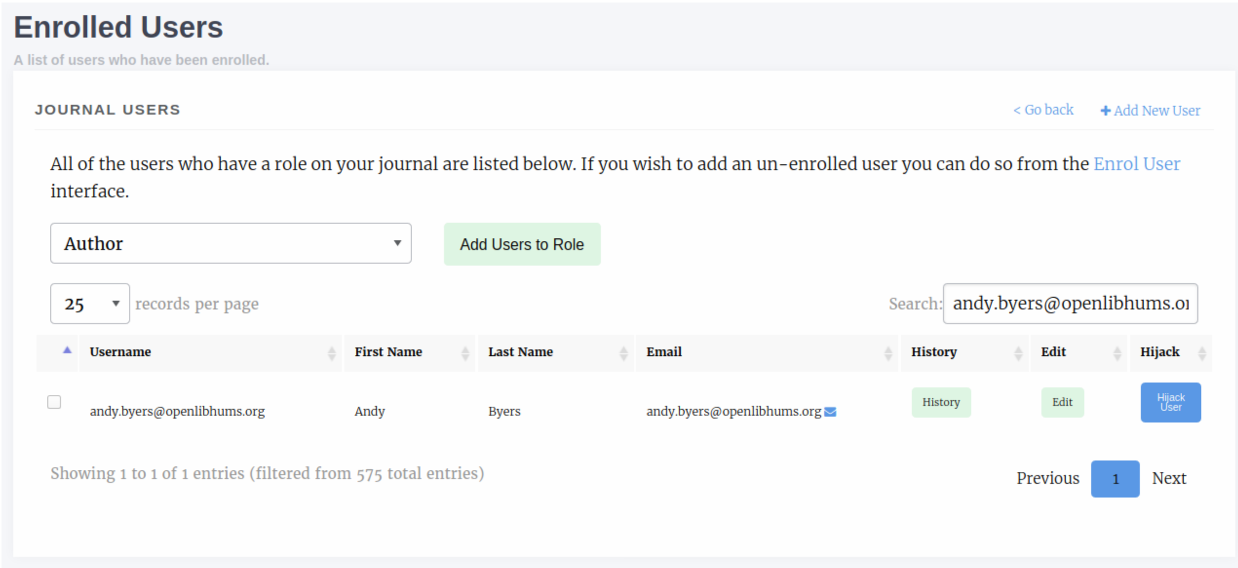


Fig. 23: The enrolled users interface. From here we can search, add new users and assign additional roles amongst other things.

3.7.2 Enrol Users

The enrol users page allows Editors to search for existing user accounts and assign them a role in their journal.

Warning: As of version 1.3.10 of Janeway editors can no longer browse a list of users and must search by name or email address to find existing users.

You can search for existing user accounts by:

- First Name
- Last Name
- Email Address

Tip: You don't need to search by all three fields. You can search by just first name or email address for example.

Once you have found an account you will be able to see which roles they have and which are available to be assigned to them.

Fig. 24: This user has two roles (Author and Editor) and can be assigned any of the other roles.

3.7.3 Inactive Users

The inactive users screen is accessible to staff only and lists all users who have not yet activated their account. You are cautioned only to activate accounts that you've confirmed ownership for.

3.7.4 Roles

The roles interface presents a list of Janeway's core roles:

- **Author**
  - Any user who registers with your journal is given this role
- Copyeditor
- **Editor**
  - Handles processing of articles and assignment of tasks
- **Production Manager**
  - Handles the assignment and processing of Typesetting articles
- **Proofing Manager**
  - Handles assignment of proofreaders and requesting typesetting changes
- Proofreader
- Reviewer
- Section Editor
- Typesetter

Once you have selected a role you will be presented with a list of users who currently have that role. There is also an option to remove the role from that user.

3.7.5 Authenticated Users

Presents a list of users who are currently logged into your install of Janeway. Only accessible to staff.

3.7.6 Merge Users (Press Manager only)

From the press manager, staff memebers can now merge two accounts together, in order to remove any potential duplicates. All linked objects (tasks, articles, roles, files…) will be transferred from the source account onto the destination account. The account profile itself is left untouched, so any profile details on the source account will be lost.

3.8 Other

The *other* section covers three things:

- Cache
- Reminders
- Email Templates

3.8.1 Clearing the Cache

Janeway uses a cache to speed up page loading, you can reset the cache from the Manager page by clicking the Clear Cache button.

3.8.2 Scheduled Reminders

Note: The Scheduled Reminders manager has been updated as part of version 1.4.

Janeway lets you define your own email reminders for overdue Reviews and Revision assignments. They are defined using the following:

- **Type**
  - Review (new), Review (accepted) or Revision reminder.
- **Run Type**
  - Whether to run before or after the request is due.
- **Days**
  - The number of days before or after the request is due this reminder should be sent.
- **Template Name**
  - The name of the template that should be used when sending the reminder. If this template does no exist you will be asked to create it.
- **Subject**
  - The email subject to send with the reminder.

A reminder email has access to three objects in the template:

- review_assignment or revision (depending on which type of reminder)
- journal - the journal sending the reminder
- article - the appropriate article

On the edit template page there is a small guide showing some of the variables you can use when generating these templates.

Fig. 25: Creating, editing and deleting a reminder.

Once a reminder is created a Cron job on the server will start processing requests but it will not process these for Review and Revision requests that have passed the reminder dates.

Tip: If automated reminders are not being sent for your journal the most likely explanation is that the cron job has not been setup properly. You should contact your administrator who can setup the call to the send_reminders management command.

3.8.3 Email Templates

The email templates system allows you to search through and edit all of the email templates for a given journal.

> **Warning:** Editing an email template could cause it to break.

Each email template has access to different objects which makes documenting this quite difficult. We will be updating our FAQ with information on templates that are edited regularly.

When editing a template you will see the default version of the email at the top and a rich-text editor below. If you do not have a specific setting for your journal (ie. you've never overwritten the default setting) the rich text box will appear blank. To get started you can copy the default version into the rich-text box and make your edits.

Tip: When editing an email that has a URL placeholder (like {{ review_url }}) it is important that you do not add anything immediately after this placeholder as email clients may interpret them as part of the link.

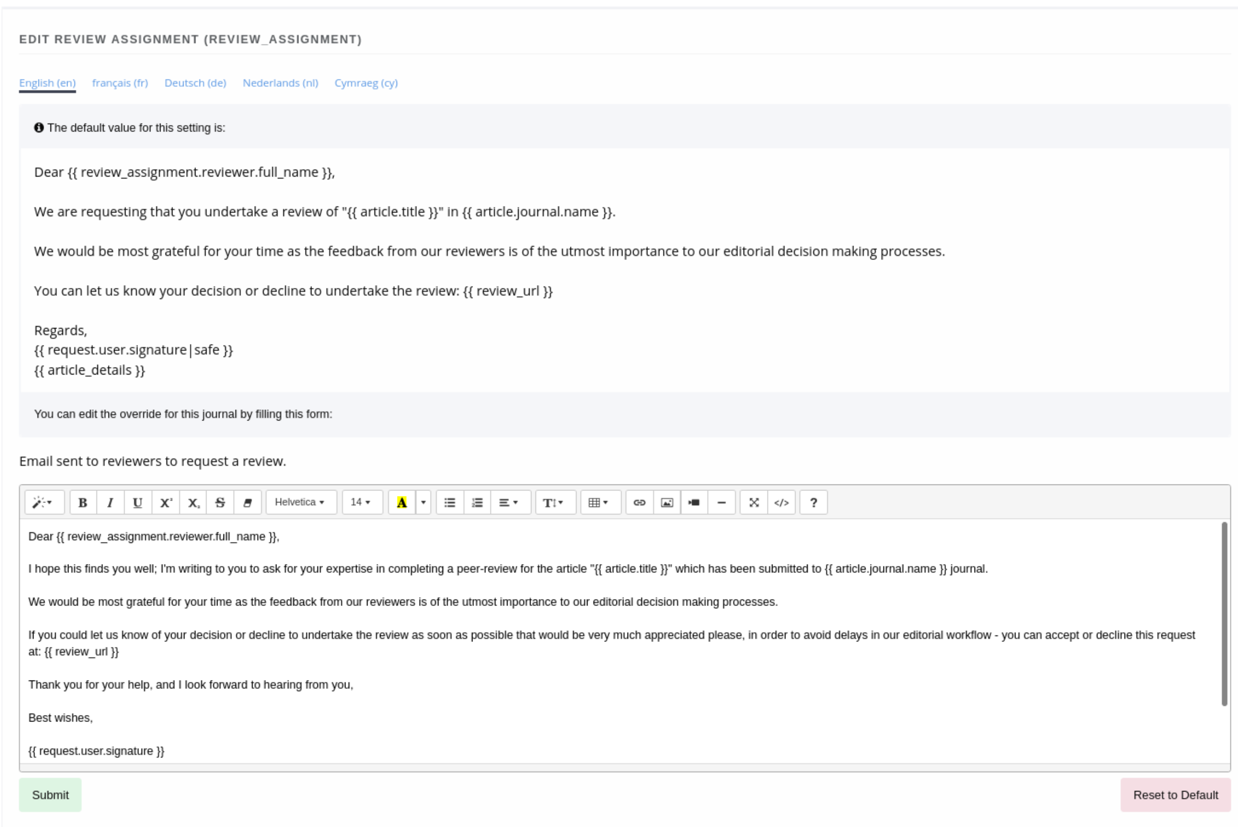


Fig. 26: Editing an email template.

CHAPTER 4

Published Content

Once you've published articles or issues you may need to manage/make changes to them. These guides will help you.

Links to manage articles that have passed through the workflow and issues can be found in the left hand menu under Back Content.

4.1 Articles

Once an article is published you may need to make changes to it eg. uploading a new galley or tweaking the metadata if there is an error.

All published articles can be found on the Articles page under Back Content. The Article back content page lists both published and rejected papers. You can search and then select an article to edit.

Tip: You can also edit papers by going to their page and using the account drop down to select the Edit Article link.

From this page you can:

- Edit metadata
- Edit publication information
- Add/remove images
- Create Publisher Notes
- Manage identifiers
- Manage galley files
- Manage which issues an article appears in

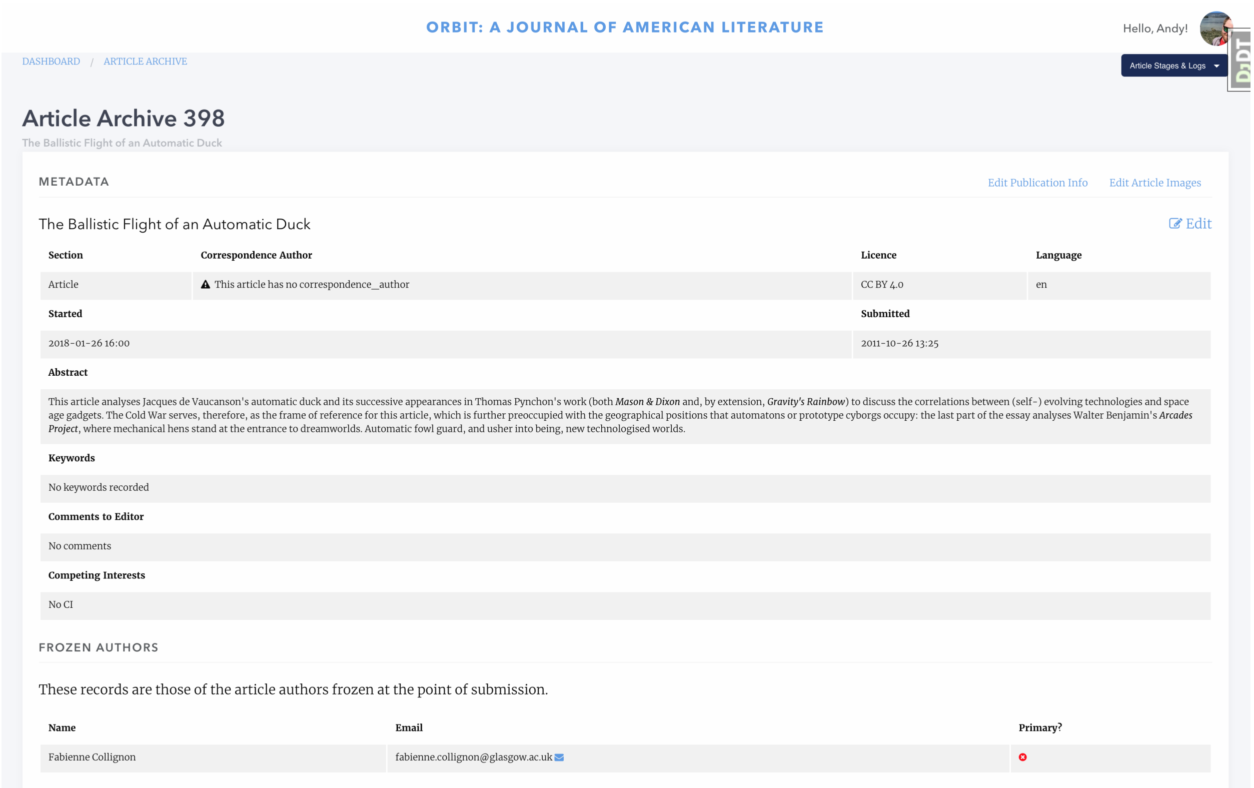


Fig. 1: Top of the article archive page

4.1.1 Metadata

The first block of the page lists most of the article's metadata. To change it you can press the Edit button.

Additionally you can make changes to the author records and re-order them as required.

4.1.2 Publication Information

The article archive page has a link to the Pre Publication page where you can make changes to any details there.

4.1.3 Images

Articles have two images

- **Large image**
  - A large landscape image.
- **Thumbnail image**
  - A small square image displayed next to the article on the Articles/Issue list pages.
- **Meta image**
  - This is used on platforms like Twitter and Facebook when a link is shared, generally the large image is used but in some cases this needs to be overwritten.

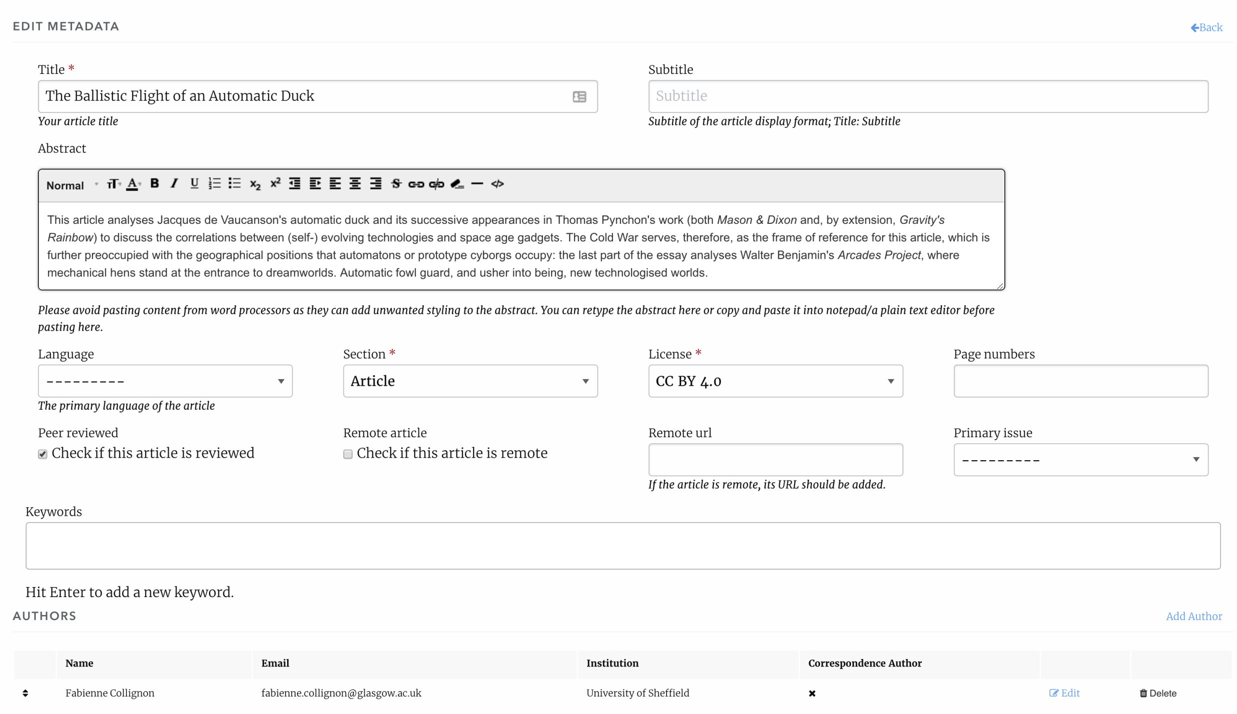


Fig. 2: Top of the article archive page

4.1.4 Publisher Notes

Publisher notes appear on the article page below the abstract and how to cite block. These can be used to notify readers of small changes to the paper like a post-publication update to fix spelling etc.

4.1.5 Identifiers

Any identifiers such as DOIs are listed here and a link to manage them is in the top right of the block. From that link you can manage the identifiers.

Warning: Janeway does not currently tell you if a DOI was deposited successfully, to do so you can test the DOI or check the issue admin system.

4.1.6 Galleys

Much like the Production page, the article archive allows you to upload new and replace old Galley files.

Warning: Editing a galley will change how it is displayed. If making changes to a published piece it is recommended you add a Publisher Note alongside it.

Tip: The Edit Galleys link will take you to the Production page.

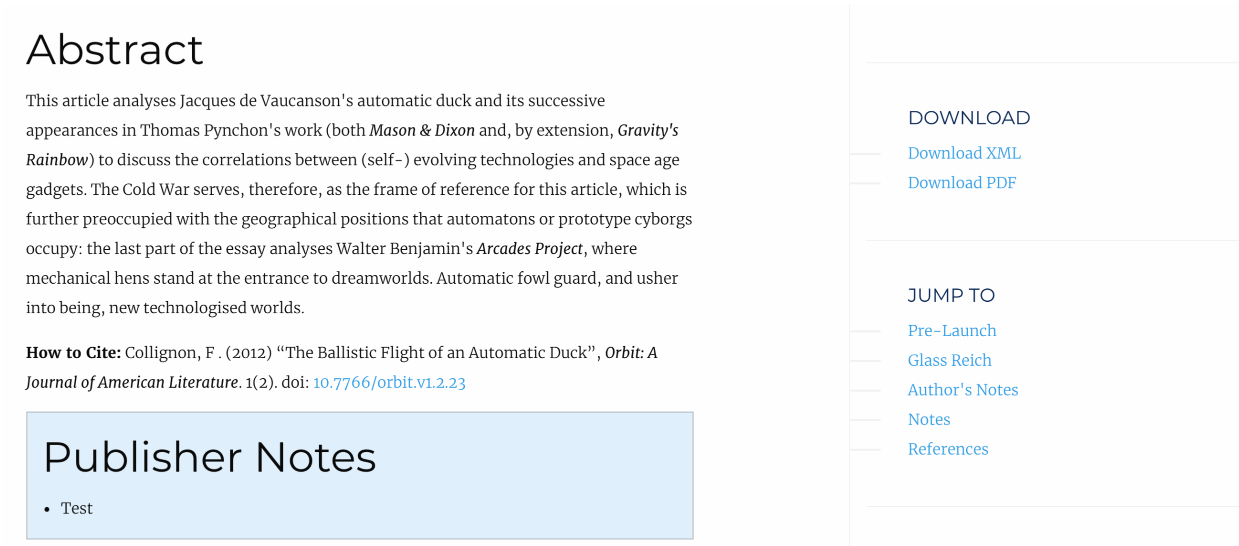


Fig. 3: Publisher note on the OLH theme

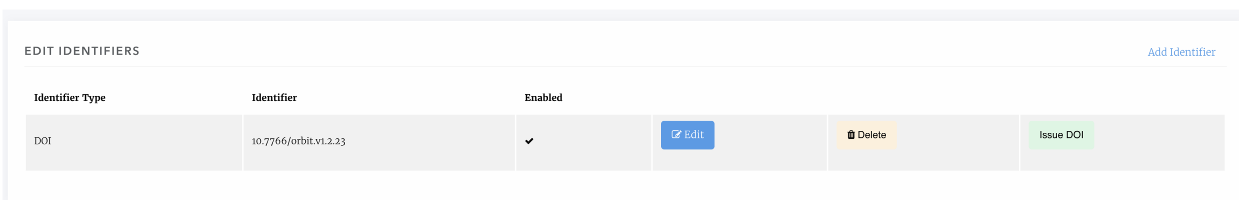


Fig. 4: The identifiers manager

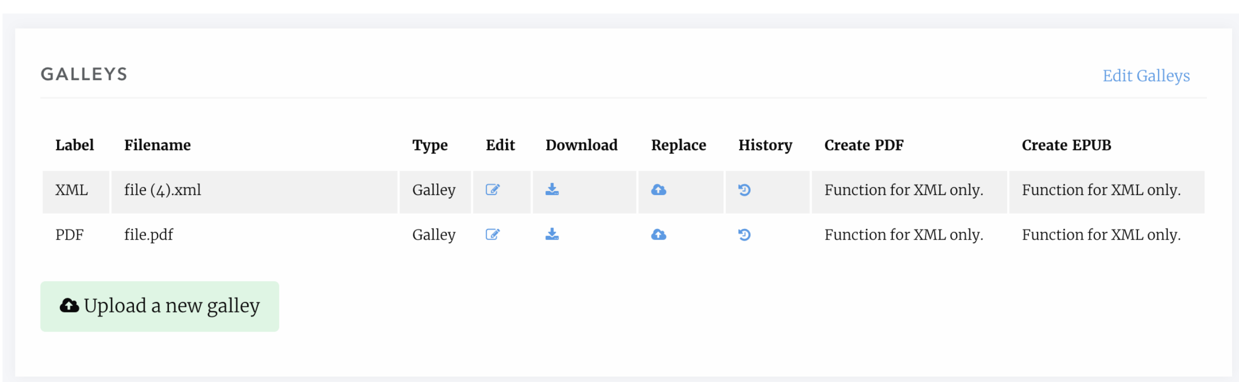


Fig. 5: Galley manager block

4.1.7 Issues

You can see the issues that an article is part of at the bottom of the Article Archive page. You can edit each of the issues or jump to the issue manager.

Fig. 6: Archive issue block

4.2 Issues

Articles do not have to be part of an issue. There are some services that do require an article have an issue or volume (such as Crossref) so we recommend that if you do continues publication that you create a yearly volume/issue to add papers to. Articles are added to Issues during the Pre Publication stage, however, Issues can be managed on their own through the Issue Manager, a link to which is available on the Manager page and the main sidebar.

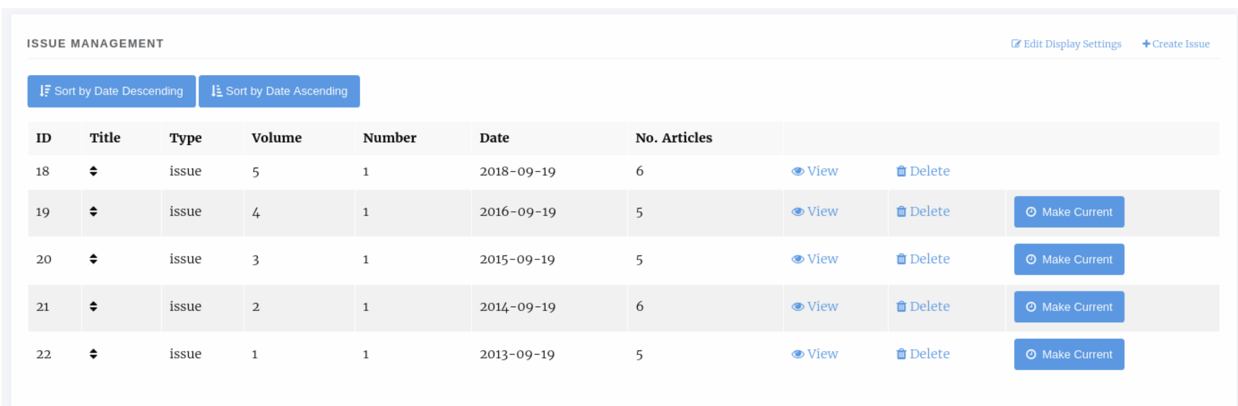


Fig. 7: The Issue Management page.

Tip: To set the current issue, click the Make Current button. The Issue without this button _is_ the current issue.

Tip: To re-order the issues you can drag and drop the rows of the tables or use the sort buttons at the top of the page.

4.2.1 Issue Types

Janeway comes with two issue types built in: Issue and Collection. Collections differ in so much as they are not a primary Issue for a paper but tend to be collections of papers with similar topics across multiple different issues. So an article may be in the Thomas Pynchon Collection but it's primary Issue may be Volume 1 Issue 2 2019. You can also define your own issue types in the Django admin area.

4.2.2 Display Settings

In the top right of the Issue Management page there is the Edit Display Settings button. This allows you to configure how issue titles are displayed.

You can turn these elements on or off:

- Volume number
- Issue number
- Issue year
- Issue title
- Article number
- Article page numbers

Here are a few example issue displays:

- Volume 6 • Issue 3 • Fall 2015 • 5–17
- Winter 2009 • 19 pages
- Volume 35 • 2021 • Number 49

Tip: If you want to display a totally custom issue title, disable everything except issue title, and use that field to form the issue display for each issue.

Tip: You can use the article number field to set an arbitrary number for each article, whether to distinguish articles within each volume or issue or to number articles across volumes and issues. Article number is an optional field separate from article ID and can be set in Edit Metadata.

4.2.3 Creating and Editing Issue Details

You can create new issues from this page using the Create Issue button and you view and edit the detail of individual issues by selecting them.

Information on the sizes of the cover image and large image can be found in the *Styling* section

4.2.4 Manage an Issue

Clicking on View takes you through to the manage issue page where you can alter an individual issue. The page is split into 4 sections.

- Issue Management
- Table of Contents
- Guest Editors
- Galleys

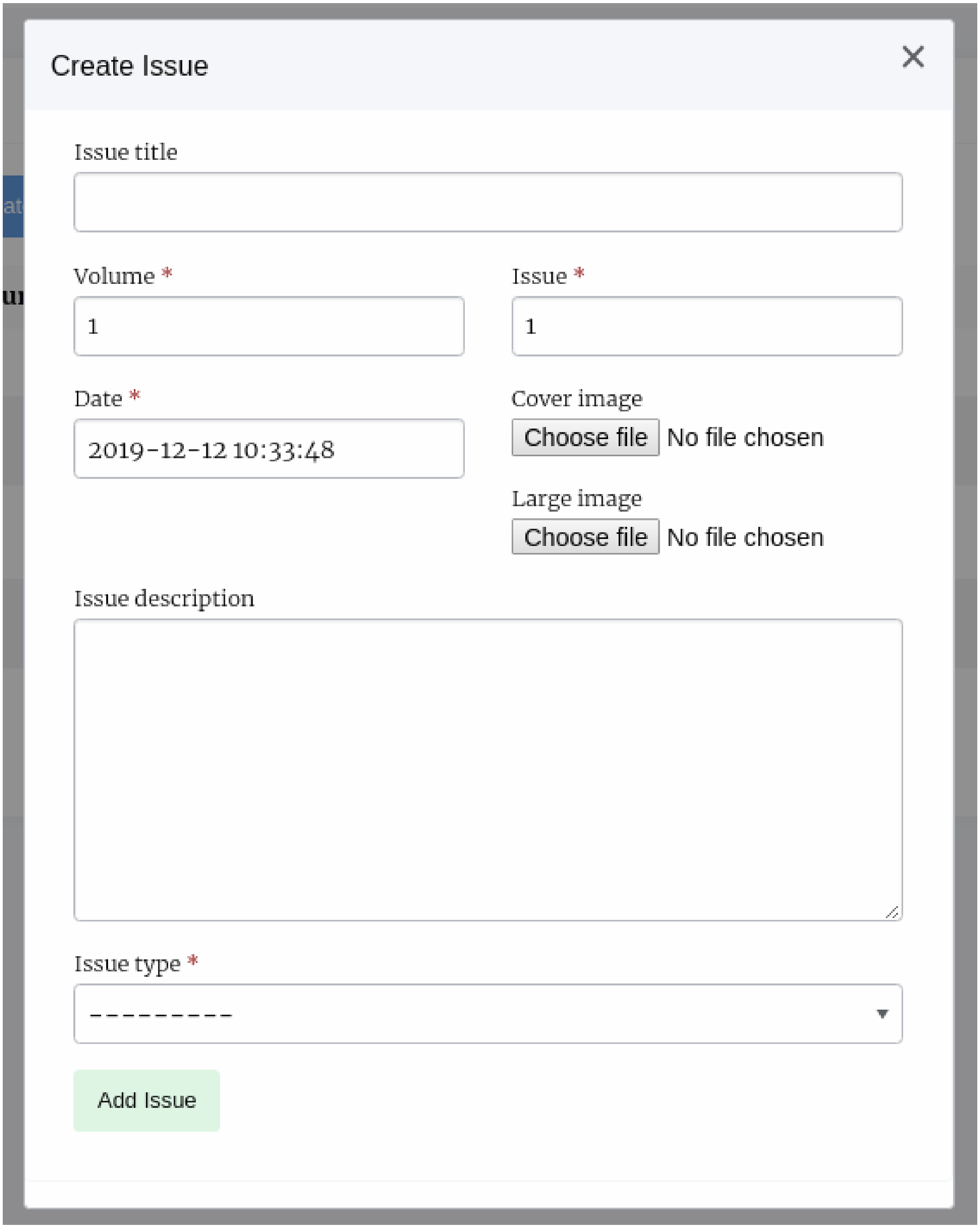


Fig. 8: An empty create issue form

4.2.4.1 Issue Management

Here you can see the metadata for your issue, edit it, delete it and if the issue is published there is a link to view it on the front end.

4.2.4.2 Table of Contents

In the Table of contents section you can add articles to the issue, sort the sections and sort the articles within their sections.

For each section there are arrow icons that allow you to move the section up and down, each of the articles can be dragged and dropped into order from inside their section.

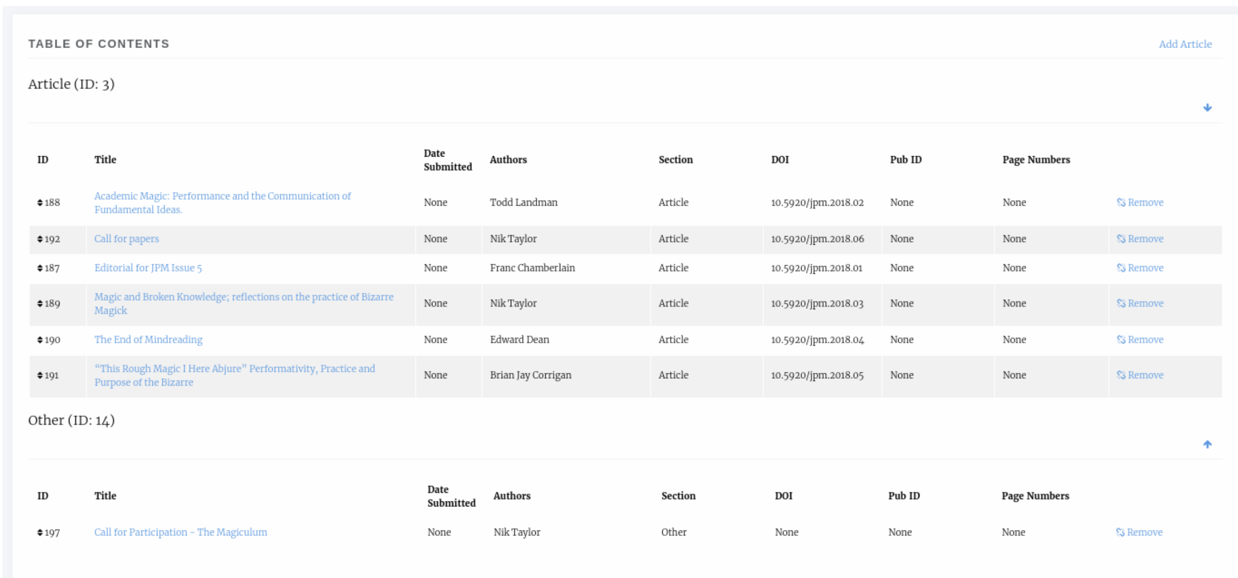


TABLE OF CONTENTS

Add Article

Article (ID: 3)

ID	Title	Date Submitted	Authors	Section	DOI	Pub ID	Page Numbers	
188	Academic Magic: Performance and the Communication of Fundamental Ideas.	None	Todd Landman	Article	10.5920/jpm.2018.02	None	None	Remove
192	Call for papers	None	Nik Taylor	Article	10.5920/jpm.2018.06	None	None	Remove
187	Editorial for JPM Issue 5	None	Franc Chamberlain	Article	10.5920/jpm.2018.01	None	None	Remove
189	Magic and Broken Knowledge; reflections on the practice of Bizarre Magick	None	Nik Taylor	Article	10.5920/jpm.2018.03	None	None	Remove
190	The End of Mindreading	None	Edward Dean	Article	10.5920/jpm.2018.04	None	None	Remove
191	"This Rough Magic I Here Abjure" Performativity, Practice and Purpose of the Bizarre	None	Brian Jay Corrigan	Article	10.5920/jpm.2018.05	None	None	Remove

Other (ID: 14)

ID	Title	Date Submitted	Authors	Section	DOI	Pub ID	Page Numbers	
197	Call for Participation - The Magiculum	None	Nik Taylor	Other	None	None	None	Remove

Fig. 9: Issue table of contents

You can drop an article from an issue using the Remove link and add new ones clicking the Add Article link.

A list of all articles published in the journal that are not already in the issue is displayed and you can use the Add button to place it in the issue.

4.2.4.3 Guest Editors

An issue can list Guest Editors if the articles aren't being handled by the normal editorial team. Use the Manage button to control who appears as a Guest Editor for an issue/collection.

When adding a new guest editor you can also enter a role, the default text for this role is *Guest Editor* though you can change it. Use the Add button to add a new guest editor.

4.2.4.4 Galleys

You can upload a Galley file for the whole issue, usually a PDF so that users can download the whole issue in one go.

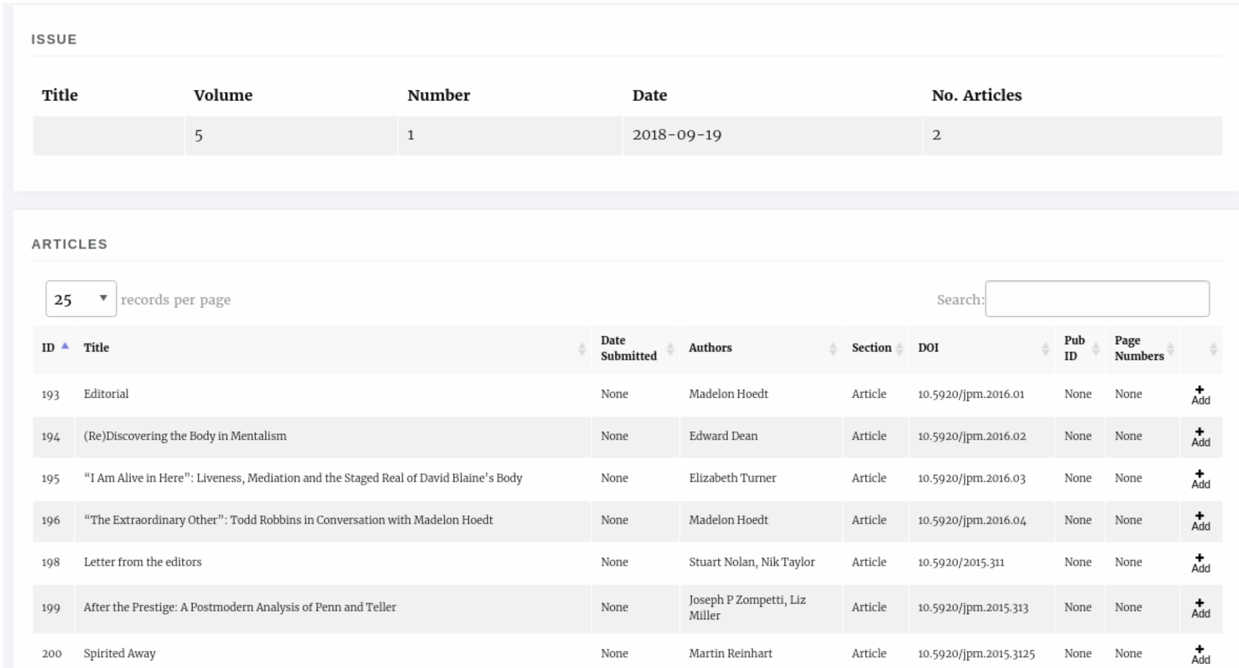


Fig. 10: Articles that can be added to issues

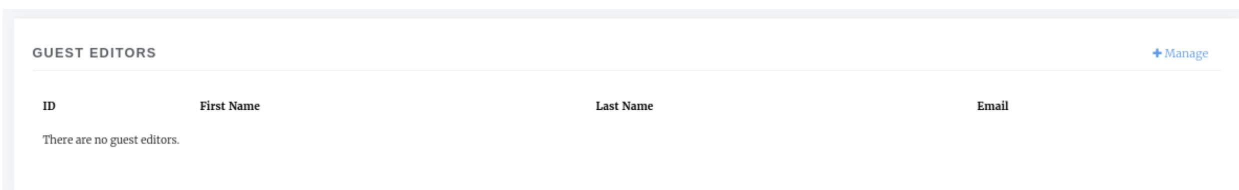


Fig. 11: An issue with no guest editors

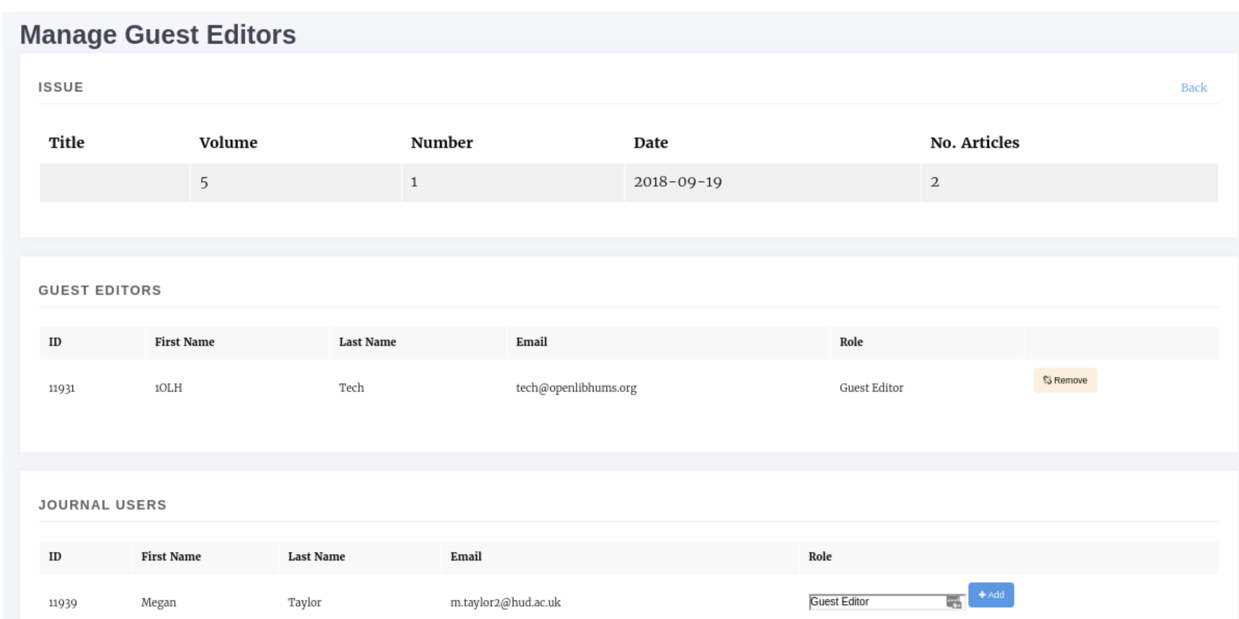


Fig. 12: An issue with no guest editors

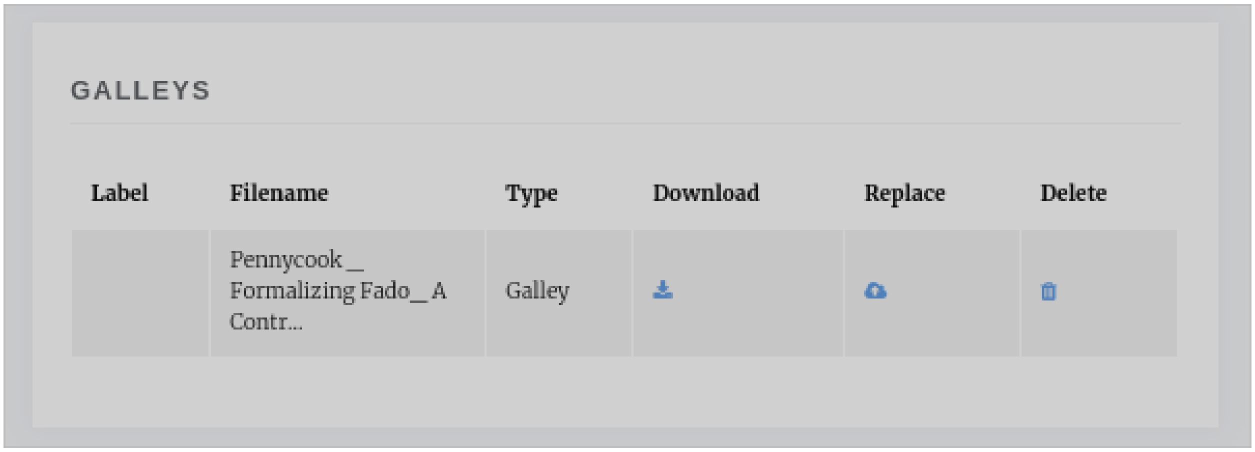


Fig. 13: An issue with no guest editors

Tip: If you don't upload a Galley for the issue then Janeway will allow users to download a zip file of all the individual article galley files.

4.3 Publication Schedule

Any articles that you publish with a publication date in the future will appear in a list on this page.

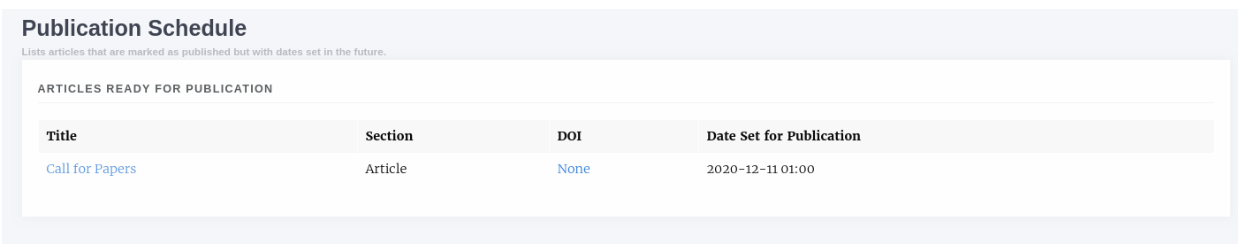


Fig. 14: Article listed for publication in the future

CHAPTER 5

Import, Export, Update

The Import / Export / Update tool lets perform batch actions in Janeway, it is available through the Imports plugin. You can import and export article metadata and files, and you can update some fields of existing articles.

The tool is distributed as a plugin for Janeway, you'll need to ask your site administrator to install it before you can start using. If you are preparing a CSV import, we recommend visiting the tool-specific documentation in order to understand what columns are required, as well as the valid data types/choice values for each column: https://janeway-imports.readthedocs.io/en/latest/

CHAPTER 6

Styling

6.1 Image guidelines

This section describes the different images that can be uploaded in Janeway to customise the look and feel of your journal, as well as the recommended sizes and aspect ratios for each theme.

6.1.1 Header Image

This image is displayed on the navigation bar for all three themes and is normally used for the journal logo. It can be changed through the *settings in the journal's Manager* (Manager > Journal Settings).

The maximum height of the image is 90px, but the width is not limited, making it suitable for either square or landscape logos.

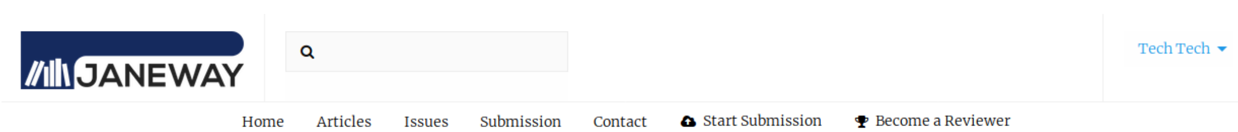


Fig. 1: Example of header image with OLH theme

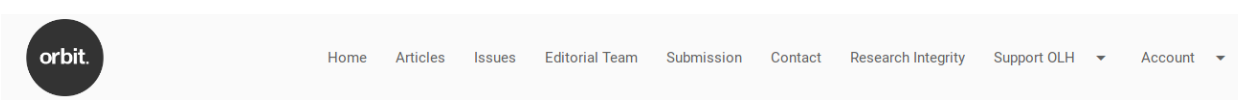


Fig. 2: Exmaple of header image with Material theme

Warning: In the material theme, the navigation buttons and the header image are rendered within the same line, comepeting for space. If a very wide image is combined with a large number of navigation items, the two may overlap on narrow screens. If your journal has a large number of navigation links (5 or more), we recommend using a dropdown menu grouping similar items.

6.1.2 Cover Image

Cover images are used for issue covers, as displayed on the Issues page. You can set them individually, and you can set a default to be used when one is not specifically provided for an issue. Add specific issue cover images under *Issue Management*, and change the default through *Journal Settings*.

These images are resized dynamically depending on various factors (number of issues, screen size, issue title length). The recommendation is to be consistent and use the same aspect ratio for both the default cover image and for any issue cover images uploaded.

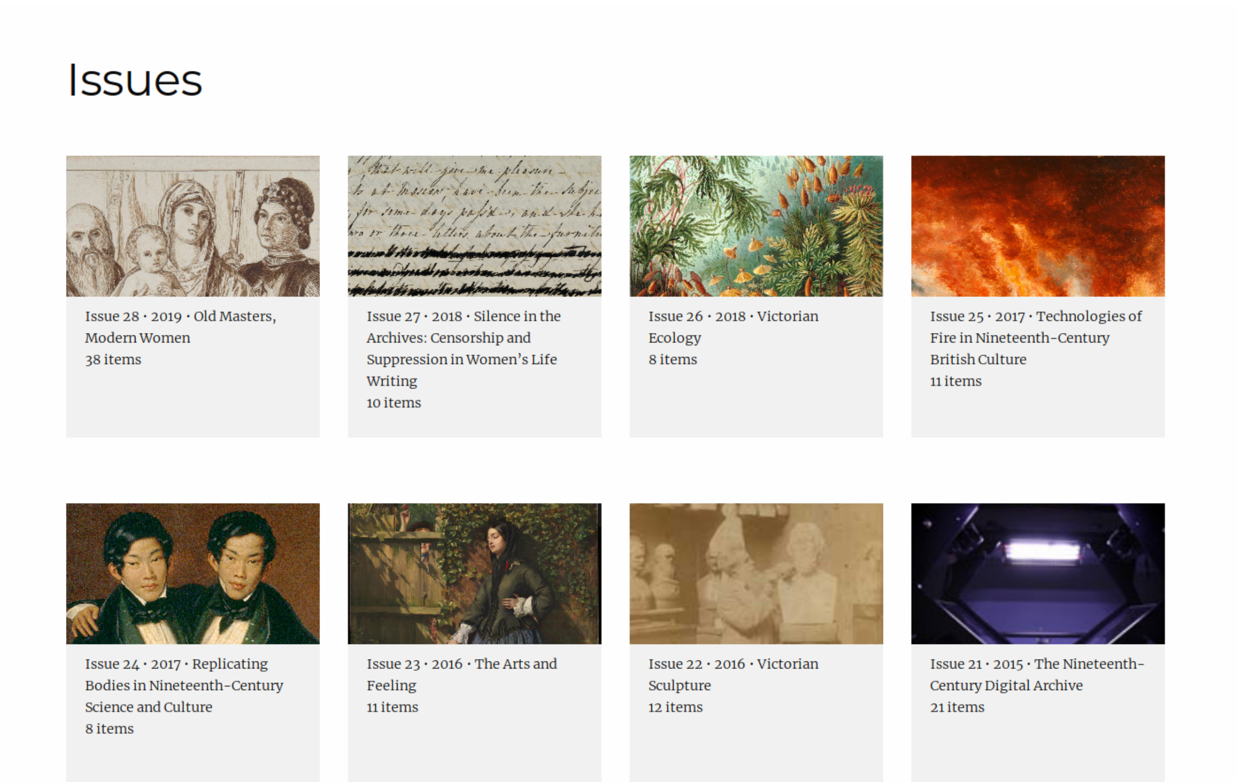


Fig. 3: Example of cover image with OLH theme

Tip: For the OLH theme, cover images and issue details are rendered stacked, so landscape images work better for this theme.

Tip: For the material theme, cover images and issue details are rendered side by side, so portrait images work better for this theme.

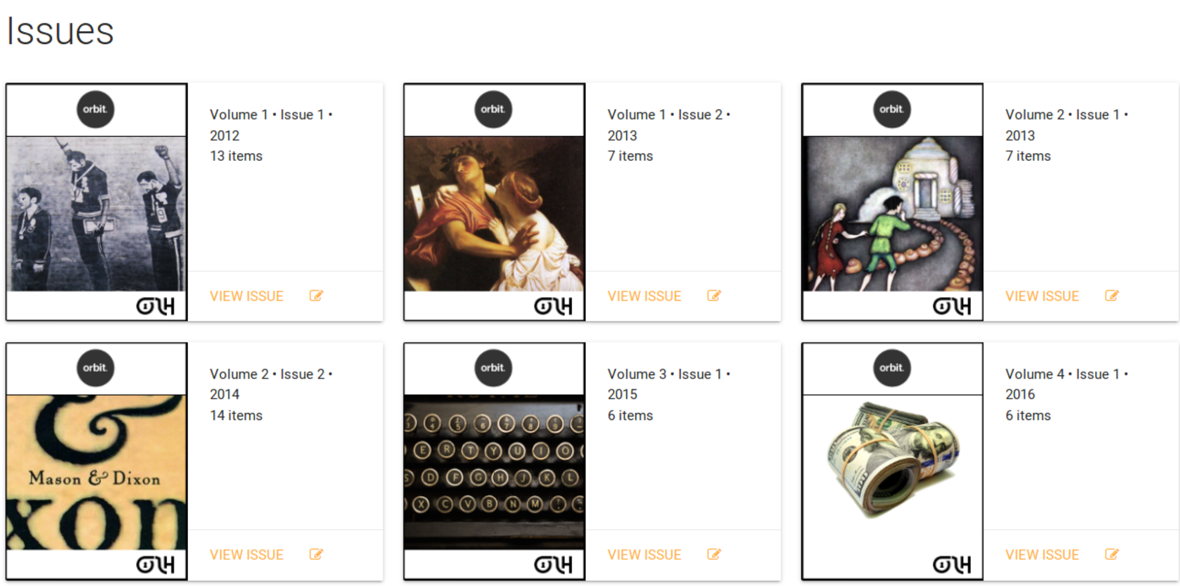


Fig. 4: Example of cover image with material theme

6.1.3 Large Image

Large images are used on article pages, on issue pages, and in any carousel that draws in these elements to the journal home page. You can set them individually, and you can set a default to be used in all other cases. You can set large images for articles in the Manager under *Articles and Issues*. The default can can be changed through *Journal Settings*.

The large image has a maximum height of 260px for the material theme and 400px for the OLH theme. Any image larger than 750x324 pixels will be compressed to fit those dimensions, and then it will be cropped horizontally to fit the user screen size. For this reason, very wide landscape images work best for this element.

Fig. 5: Example of large image: material theme

Tip: In the material theme, the large image width maxes out at 750px on wide screens.

Tip: In the OLH theme, the large image spans across the entire width of the screen.

Tip: The article images can be disabled entirely in the Manager under *Articles and Issues*.

6.1.4 Issue Images

The Issue page uses the Cover Image file of an Issue and, if it's not available, the default cover image for its parent journal and displays them in portrait for the Material and OLH themes. The Clean theme does not have images on the Issue page.

6.1.5 Collection Images

The Collection page uses the Large Image file of an Issue and, if it's not available, the default large image for its parent journal. In all three core themes landscape images are best here.

Tip: Whilst there are recommended image sizes for the Issue and Collection pages consistency is more important. If you load images of 300x200 for a Collection you should consistently load images with the same aspect ratio.

6.1.6 Favicon

This small icon serves multiple purposes in the user's browser.

From wikipedia: A favicon /fæv.kn/ (short for favorite icon), also known as a shortcut icon, website icon, tab icon, URL icon, or bookmark icon, is a file containing one or more small icons, associated with a particular website or web page. A web designer can create such an icon and upload it to a website (or web page) by several means, and graphical web browsers will then make use of it. Browsers that provide favicon support typically display a page's favicon in the browser's address bar (sometimes in the history as well) and next to the page's name in a list of bookmarks. Browsers that support a tabbed document interface typically show a page's favicon next to the page's title on the tab, and site-specific browsers use the favicon as a desktop icon.

We recommend using an icon of up to 100x100px, as this should fit most use cases.

CHAPTER 7

Robots and Sitemaps

In version 1.4.1 of Janeway we are introducing the generation of Robot and Sitemap files.

7.1 Sites

This document uses the word "sites" to describe the Press site, Journal site(s) and Repository site(s).

7.2 Robots

You can generate a robots.txt file for your Janeway sites by running the following management command:

`python3 src/manage.py generate_robots`

Running this command will generate robots.txt files. If you are using path mode it will generate a single robots file for your entire site. If you are running in domain mode it will create a top level robots.txt for sites without a domain and also an individual robots file for each site with a domain. These files are stored in *src/files/robots/*.

Here is an example directory where we are running in domain mode:

- **files/**
  - **robots/**
    - journal_orbit_robots.txt
    - repo_olh_robots.txt
    - robots.txt

The build in robots view will return the correct file automatically. At this point we recommend you leave serving the robots file to Janeway, though you could configure your webserver to serve it for you.

7.3 Sitemaps

You can generate sitemap.xml files for your Janeway sites by running the following management command:

`python3 src/manage.py generate_sitemaps`

Running this command will generate:

- **A top level sitemap linking to:**
  - **Journal sitemap linking to:**
    - Issue level sitemap with links to articles
  - **Repository sitemap linking to:**
    - Subject level sitemap with links to publications

These files are stored in *src/files/sitemaps/* and the directory structure looks as follows:

- **files/**
  - **sitemaps/**
    - sitemap.xml
    - **orbit/ - Journal**
      - 50_sitemap.xml - Issue
    - **olh/ - Repository**
      - sitemap.xml - Root sitemap, this repository is in domain mode
      - 1_sitemap.xml - Subject

Janeway has a built in view that can handle the serving of the sitemaps files but you can also configure your webserver to serve these files for you, this can be quite complex when in domain mode and may best be left to Janeway to handle however.

7.4 Custom Robots/Sitemaps

If you don't want Janeway to serve robots or sitemap files you can configure your webserver to handle the URL routes that Janeway uses.

7.5 Cron

Generation of sitemap files needs to be regular to ensure they are up to date. Janeway's `install_cron` command has been updated to install this command for you if you're using crontab. However you will need to schedule this manually otherwise, currently we recommend you regenerate files every 30 minutes.

CHAPTER 8

Installation Guide

There are a number of ways to get Janeway up and running. For development we recommend you use Docker with Postgres as the DB_VENDOR. A Lando configuration is also included.

8.1 Running Janeway with Docker and docker-compose

1. Install `docker`, `docker-compose` and `GNU Make`.
2. From the /path/to/janeway directory run `make install`.
3. A docker environment will be provisioned, and shortly after the janeway isntall script will run. Follow the instructions on screen to complete the installation.
4. Once install is complete run `make run` to run the django development server against a Postgres backend.
5. For Janeway browse `http://localhost:8000`/.
6. If using Postgres (e you can also browse `http://localhost:8001` for pgadmin. The default root password is *janeway-web*

The Makefile provides a number of other targets for common tasks during development.

- `make db-client`: Will open a database shell that matches your configured `DB_VENDOR`. (e.g. running `make db-client` with the default options will run an interactive psql instance from the postgres container)
- `make command` allows you to run django management commands using the CMD variable (e.g `make command CMD=migrate journal` would be equivalent to running *python3 src/manage.py migrate journal* in a native install)
- **`make check` will run Janeway's test suite with some predetermined configuration options to improve performance:**
    - It runs against a sqlite backend
    - database migrations are skipped

- If you want to run the test suite against the database server then run it as a django management command with `make command CMD=test`
- `make attach`: Attach to the running Janeway container and run an interactive shell (a Janeway development server must be running with `make run` for this to work)
- `make shell`: Start a janeway container and run an interactive shell. (It will bind port 8000 on your host so you cannot run this if a janeway server is running, in that case use *make attach* instead)
- `make rebuild`: Rebuilds the Janeway docker container. It should only be used when you make changes to the dependencies that need to be installed (e.g adding add new library to `requirements.txt`)
- `make db-save-backup`: Save a backup of the database container. The command will return the name of the file in which the backup is stored. The backup is created by compressing the entire database container volume.
- `make db-load-backup BACKUP=<backup file>`: Load a previously generated backup. You must set the BACKUP variable to the filename returned by a previous run of `make db-save-backup`

The Makefile can be configured with a number of variables to change the way in which your development environment is run.

- **If you want to run janeway against a different database vendor, you can use the *DB_VENDOR* variable. The following val**
    - e.g. if you want to install the development environment for Janeway using a mysql container, you can run `make install DB_VENDOR=mysql` for the installation and `make run DB_VENDOR=mysql` to spin up the mysql container alongside the Janeway development server.
- By default, the database backend will come with a database named `janeway`. If you want to Janeway against a different database (e.g.: you have multiple local databases) you can set the DB_NAME variable (e.g.: `make install DB_NAME="janeway_staging"` or `make run DB_NAME=janeway_production`
- The `JANEWAY_PORT` variable allows you to change the port to which the Janeway development server will be bound to on your host (set this if port 8000 is already in use by another service on your host)

If you want to install custom python libraries for development, you can drop them into the dev_requirements.txt file and run `make rebuild`. Rebuilding the container takes some time, so it is also possible to install python libraries in development mode. When installed in this manner, the library is mounted as a volume into the janeway container when you first run *make rebuild* and you will be able to make changes to the library without having to run `make rebuild`. In order to install a library in development mode, copy the code to `/path/to/janeway/lib/` and run `make rebuild` once.

8.2 Using Lando for a development environment (optional)

Lando can be used to construct and manage a local a development environment. Here are the steps required to get Janeway running on your local machine, using Lando:

Note: Lando comes bundled with Docker Desktop for MacOS, if you already have Docker Desktop installed on your Mac, don't re-install it. You should instead ensure you have the same (or newer) version as what is bundled with Lando.

1. Make sure Lando is installed
2. Optionally, copy `dockerfiles/lando_local.env.example` to `dockerfiles/lando_local.env` and customize as appropriate (the database configuration is done with environment variables, so pay attention to `dockerfiles/lando_local.env` if it's important to you)

3. `lando poweroff` (defensively ensure no other Lando environments are running, probably not necessary, but a good habit)
4. `lando rebuild`
5. When you see the big "Boomshakala" message from Lando, you're ready to proceed
6. `lando manage check` will confirm the installation is working, and notify you of any misconfigurations
7. Revise your src/core/settings.py file as directed in the *Database Setup and Final Installation* instructions below
8. `lando logs -f` will show you the log output from Janeway, though when you're getting started, *lando manage check* will help you find configuration errors much faster than sifting through log file output
9. `lando manage <command>` will send commands to the src/core/manage.py script, run *lando manage -h* to see more info
10. `lando manage install_janeway` will continue your installation of Janeway
11. `lando manage test` will run the Janeway unit test suite
12. `lando python <command>` will send Python commands to the appserver
13. Browse to *http://localhost:8000* to see the site in action
14. run `lando` to see what other Lando tooling commands are available.

8.3 Lando Tooling

- `lando psql` Drops into the PostgreSQL client running on the database service
- `lando db-import <file>` Imports a dump file into the database service
- `lando ssh` Drops into a shell on the application service, runs commands
- `lando start` Starts the Janeway app
- `lando stop` Stops the Janeway app
- `lando rebuild` Rebuilds the Janeway app
- `lando restart` Starts and stops the Janeway app, useful for forcing the app to use new configurations
- `lando destroy` Removes all traces of the Janeway dev environment's containers, useful if you need to ensure a fresh start

More Lando tooling can be added, if you need it.

8.4 Native Install

The following is for Debian/Ubuntu-based systems (16.04).

1. Install python3, pip3 & virtualevwrapper and create a project

```
sudo apt-get install python3 python3-pip python-pip virtualenvwrapper
source /etc/bash_completion.d/virtualenvwrapper
mkvirtualenv janeway -p /usr/bin/python3
```

2. Install system dependencies.

On Ubuntu systems: `sudo apt-get install libxml2-dev libxslt1-dev python3-dev zlib1g-dev lib32z1-dev libffi-dev libssl-dev libjpeg-dev libmysqlclient-dev`

On Debian systems: `sudo apt-get install libxml2-dev libxslt1-dev python3-dev zlib1g-dev lib32z1-dev libffi-dev libssl-dev libjpeg-dev`

3. Clone the janeway repo to your local machine: `git clone https://github.com/BirkbeckCTP/janeway.git`
4. From the project root directory run the following to install python dependencies:

   `pip3 install -r requirements.txt`

You should now proceed to "Database Setup and Final Installation", below.

8.5 Database Setup and Final Installation

1. Copy the example settings file: `cp src/core/example_settings.py src/core/settings.py`
2. Update settings.py for your env (database login etc.) and setup your database. This must support utf8_mb4. For MySQL installs, use the following CREATE command:

   `CREATE DATABASE janeway CHARACTER SET = utf8 COLLATE = utf8_general_ci;`
3. From inside the src directory, switch to the virtual environment:

   `workon janeway`
4. Run the installer

   `python3 manage.py install_janeway`

and follow the on screen instructions.

```
> Please answer the following questions.

> Press name: Test Press

> Press domain: test.press.com

> Press main contact (email): ajrbyers@gmail.com

> Thanks! We will now set up out first journal.

> Journal #1 code: tstj

> Journal #1 domain: journal.press.com
```

If you are installing Janeway on a live server rather than on your local development environment its at this point you'll need to look at a webserver, Django is supported by Apache via mod_wsgi and with NGINX through a variety of tools. We have an [[Apache and mod_wsgi (Server Install)|Janeway,-Apache-and-WSGI]] guide.

4. Once the command line installer is complete you can complete the setup process by directing your browser to: http://yourfirstjournal.com/install/

CHAPTER 9

Technical Configuration

This section will discuss the technical configuration of Janeway focusing on the Django settings file.

Note: This section is currently a work in progress.

9.1 Django Settings

Unlike traditional Django applications Janeway has two settings files, they are generally located in *src/core/*.

- janeway_global_settings.py
- settings.py (created during the installation process)

9.2 Global Settings

The global settings file is created by the Janeway team and is managed through version control. Generally speak you should not need to change anything in this file as you can use your local *settings.py* file to override variables.

9.3 Local Settings

This file is usually created during the setup process and can be based on the provided *example_settings.py* file.

- DEBUG - Should be set to False in any environment where an external user can access the install.
- URL_CONFIG - Set to either 'domain' or 'path' dependind on whether the primary way to access sites is via individual domains for each or path based urls eg. journal.press.com or press.com/journal/.
- DATABASES - You can set the database connection details for the install.
- CAPTCHA_TYPE - Can be one of three different variables: 'simple_math', 'recaptcha' or 'hcaptcha'.

- simple_math - A very simple captcha using a basic mathematical question.
- recaptcha - Uses Google's reCaptcha2. Has been shown to be less effective recently but v3 is not GDPR compliant. You should complete 'RECAPTCHA_PRIVATE_KEY' and 'RECAPTCHA_PUBLIC_KEY' otherwise you will get an error.
- hcaptcha - Uses hcaptcha, a new addition to Janeway. You should complete 'HCAPTCHA_SITEKEY' and 'HCAPTCHA_SECRET' otherwise you will get an error.

CHAPTER 10

Changelog

10.1 v1.4

Version 1.4 makes a move from HVAD to ModelTranslations as well as some bugfixes and improvements.

10.1.1 ModelTranslations

Janeway now uses ModelTranslations to store translated settings and metadata. The setting *USE_I18N* must be set to *True* in settings.py otherwise settings may not be returned properly.

1.4 has support for:

- News
- Pages
- Navigation
- Sections
- Editorial Groups
- Contacts
- Journals
- Article (limited to Editors only, title and abstract)

Support for Welsh (Cymraeg) is included. Support for German, French, Spanish and Italian is coming soon.

10.1.2 General

- The backend has been updated to use the Open Sans font.
- The default theme has been removed from core and now has its own repo (https://github.com/BirkbeckCTP/janeway/issues/1895)

- The clean theme is now part of core (https://github.com/BirkbeckCTP/janeway/issues/1896)
- All themes have a language switcher when this setting is enabled (https://github.com/BirkbeckCTP/janeway/issues/2159)
- When an Issue number is 0 it will no longer be displayed (https://github.com/BirkbeckCTP/janeway/pull/2338)
- The register page has been updated to make it clear you're registering for a press wide account (https://github.com/BirkbeckCTP/janeway/issues/2390)
- Author text on the OLH theme is now the same size as other surrounding text (https://github.com/BirkbeckCTP/janeway/issues/2368)

10.1.3 News

- The news system can now be re titled eg. Blog (https://github.com/BirkbeckCTP/janeway/issues/2381)
- News items can have a custom byline (https://github.com/BirkbeckCTP/janeway/issues/2382)

10.1.4 Bugfixes

- When sending data to crossref the authors are now in the correct order (https://github.com/BirkbeckCTP/janeway/issues/2157)
- doi_pattern and switch_language are no longer flagged as translatable (https://github.com/BirkbeckCTP/janeway/issues/2088 & https://github.com/BirkbeckCTP/janeway/issues/2160)
- *edit_settings_group* has been refactored (https://github.com/BirkbeckCTP/janeway/issues/1708)
- When assigning a copyeditor Editors can now pick any file and it will be presented to the copyeditor (https://github.com/BirkbeckCTP/janeway/issues/2078)
- JATS output for *<underline>*: *<span class="underline">* is now supported via *common.css* (https://github.com/BirkbeckCTP/janeway/pull/2322)
- When a news item, journal and press all have no default image news items will still work (https://github.com/BirkbeckCTP/janeway/issues/2531)
- Update to our XSLT will display more back matter sections (https://github.com/BirkbeckCTP/janeway/issues/2502)
- Users should now be able to copy content from the alternate citation styles popup (https://github.com/BirkbeckCTP/janeway/issues/2506)
- A new setting has been added to allow editors to add a custom message to the login page (https://github.com/BirkbeckCTP/janeway/issues/2504)
- A new setting has been added to add custom text to the end of a crossref datestamp (https://github.com/BirkbeckCTP/janeway/issues/2504)

10.1.5 Workflow

- We now send additional metadata to crossref inc. abstract and accepted date (https://github.com/BirkbeckCTP/janeway/issues/2133)
- The review assignment page has been sped up, suggested reviewers is now a setting and is off by default (https://github.com/BirkbeckCTP/janeway/pull/2325)

- Articles that are assigned to an editor but not sent to Review now have a warning that lets the Editor know this and has a button to move the article into review (https://github.com/BirkbeckCTP/janeway/pull/2322)
- A new setting has been added to allow editors to hide Review metadata from authors including the Reviewer decision (https://github.com/BirkbeckCTP/janeway/issues/2391)

10.1.6 Manager

Many areas of the Manager have been reworked. We now have a better grouping of settings and additional groupings. Reworked:

- Journal Settings
- Image Settings (new)
- Article Display Settings
- Styling Settings

Other areas have been redesigned:

- Content Manager
- Journal Contacts
- Editorial Team
- Section Manager
- The Review and Revision reminders interface has been reworked to make it easier to use. A new reminder type (accepted) so you can have different templates for reminder unaccepted and accepted reviews. (https://github.com/BirkbeckCTP/janeway/issues/2370)

New areas have been added:

- Submission Page Items is a new area that lets you build a custom Submission Page with a combination of free text, links to existing settings and special displays (like licenses and sections).
- Media Files lets editors upload and host files like author guidelines or templates

10.1.7 Plugins

- A new hook has been added to the CSS block of all themes - this can be used in conjunction with the new Custom Styling plugin to customise a journal's style. (https://github.com/BirkbeckCTP/janeway/issues/2385)

10.1.8 API

- A KBART API endpoint has been added *[url]/api/kbart* (https://github.com/BirkbeckCTP/janeway/issues/2035)

10.1.9 Feature Removal

- The ZIP Issue Download feature has been removed, this is due to the fact that in its current form it does not work and is regularly hit by spiders and bots that cause disk space to fill up. The hope is that we can work out a way to bring this back in the future. The Issue Galley feature remains active. (https://github.com/BirkbeckCTP/janeway/issues/2504)

10.1.10 Deprecations

- *utils.setting_handler.get_requestless_setting* has been marked as deprecated and will be removed in 1.5.
- PluginSettings and PluginSettingValues are deprecated as of 1.4 - all settings are now stored in *core.Setting* and *core.SettingValue* a migration moved PluginSettings over to core.Setting in 1.4 and uses a group name *plugin:PluginName*.

10.2 v1.3.10

Version 1.3.10 includes updates mainly for Peer Review. Updates to documentation will be released with a later Release Candidate.

10.2.1 Bugfixes

- The Edit Metadata link now shows for Section Editors (https://github.com/BirkbeckCTP/janeway/pull/2183)
- Fixed a bug where the review assignment page wouldn't load if a reviewer had multiple ratings for the same review (https://github.com/BirkbeckCTP/janeway/issues/2168)
- Fixed wrong URL name in review_accept_acknowledgement (https://github.com/BirkbeckCTP/janeway/pull/2165)
- Section editors are now authorised by the *article_stage_accepted_or_later_or_staff_required* security decorator (https://github.com/BirkbeckCTP/janeway/pull/2162)
- The edit review assignment form now works properly after a review has been accepted (https://github.com/BirkbeckCTP/janeway/pull/2156)
- When a revision request has no editor we now fallback to email journal editors rather than sending no email (https://github.com/BirkbeckCTP/janeway/pull/2150)
- Only published issues display in the Issue sidebar (https://github.com/BirkbeckCTP/janeway/issues/2113)
- Empty collections are now excluded from the collections page (https://github.com/BirkbeckCTP/janeway/pull/2139)
- When revising a file the supplied label is retained and defaults now to "Revised Manuscript" (https://github.com/BirkbeckCTP/janeway/issues/2128)
- Guest Editors now display properly on Issue pages (https://github.com/BirkbeckCTP/janeway/issues/2134)
- Fixed potential validation error when sending emails using the contact popup (https://github.com/BirkbeckCTP/janeway/issues/1967)
- Fixed issue where when two or more review form elements had the same name the review would not save (https://github.com/BirkbeckCTP/janeway/pull/2108)

10.2.2 Workflow (Review)

- The draft decisions workflow has been updated to be more user friendly (https://github.com/BirkbeckCTP/janeway/issues/1809)
- Article decisions have been moved from the main review screen to a Decision Helper page (https://github.com/BirkbeckCTP/janeway/issues/1809)

- When using the enrol pop up when assigning a reviewer you can now select a salutation (https://github.com/BirkbeckCTP/janeway/issues/2143)
- The Request Revisions page has had some of its wording updated (https://github.com/BirkbeckCTP/janeway/issues/2131)
- The Articles in Review page has has some of its wording updated and now displays even more useful information (https://github.com/BirkbeckCTP/janeway/issues/2122)
- Review Type has been removed from the Review Assignment form (https://github.com/BirkbeckCTP/janeway/pull/2119)
- The Review Form page now displays useful metadata for the Reviewer (https://github.com/BirkbeckCTP/janeway/issues/2101)
- Added a Email Reviewer link to the Review Detail page (https://github.com/BirkbeckCTP/janeway/issues/1967)
- Added tooltips to user action icons and moved reminder link to dropdown (https://github.com/BirkbeckCTP/janeway/issues/2002)

10.2.3 Emails

- The Peer Review Request email now contains useful metadata (https://github.com/BirkbeckCTP/janeway/issues/2100)
- *send_reviewer_accepted_or_decline_acknowledgements* now has the correct link and more useful information (https://github.com/BirkbeckCTP/janeway/issues/2102)

10.2.4 Author Dashboard

- You can enable the display of additional review metadata for authors. Originally this was always available but is now a toggle-able setting that is off by default (https://github.com/BirkbeckCTP/janeway/issues/2103)

10.2.5 Manager

https://github.com/BirkbeckCTP/janeway/issues/2149 The Users and Roles pages have been updated to:

- Enrolled Users (those users who already have a role on your journal)
- Enrol Users (allows you to search, but not browse, users to enrol them on your journal)
- Roles (now only displays users with the given role)
- One click access is now enabled by default for all new journals (https://github.com/BirkbeckCTP/janeway/pull/2105)

10.2.6 Front End

- Added support for linguistic glosses (https://github.com/BirkbeckCTP/janeway/issues/2031)
- Privacy Policy links are now more visible on Registration pages (https://github.com/BirkbeckCTP/janeway/pull/2174)

10.2.7 Crossref & Identifiers

https://github.com/BirkbeckCTP/janeway/issues/2157 Crossref deposit has been update:

- Authors are now in the correct order
- Abstracts are included
- Date accepted is included
- Page numbers are included
- Publisher IDs can now have . (dots) in them (https://github.com/BirkbeckCTP/janeway/pull/2173)

10.2.8 Docker

- When running docker using Postgres a pgadmin container is automatically connected (https://github.com/BirkbeckCTP/janeway/pull/2172)

10.3 v1.3.9

10.3.1 Workflow

- A new setting has been added to enable a Review Assignment overview to appear on the list of articles in review. This will display the initials of the reviewer, the current status of the review and when it is due and includes colour coding to assist. This can be enabled from the Review Settings page. [Manager > Review Settings] #1847
- When no projected issue is assigned to an article users are warned that Typesetters will not know which issue the paper will belong to #1877
- Peer Reviewers can now save their progress #1868
- Section Editors will now work as expected when assigned to a section to work on (#1934)

10.3.2 Front End

- A bug on the /news/ page caused by not having a default banner image has been fixed #1879
- Editors can now exclude the About section from the Submissions page. #1881

10.3.3 Authentication

- Fix integrity issues when editing a user profile with mixed case email addresses. #1807

10.3.4 Themes

- The OLH theme build_assets command now handles Press overrides. #1821
- The privacy policy link on the footer can now be customized for the press and for the journals via a setting under Journal settings, A default can be set for all journals press 'Journal default settings'.
- Material now has social sharing buttons similar to what OLH theme already provided #1995

10.3.5 Frozen Authors

- Frozen author metadata was being overridden when calling article.snapshot_authors. There is now a force_update flag to control this behaviour. #1832
- Refactored the function to iterate the authors in article.snapshot_authors so that authors without an ArticleAuthorOrder record are not ignored. #1832

10.3.6 Manager/Settings

- Staff members can now merge accounts together from the press manager #1857
- Editor users can now access the Review and Revision reminder interface. [Manager > Scheduled Reminders] #1848
- Editors can now soft delete review forms. When deleted thay are hidden from the interface. Admins and Superusers can reinstate them from Admin. #1854
- Editors can now drag-and-drop reorder review form elements, elements are now ordered automatically. #1853
- Fixed a bug that would override the default setting. #1861

10.3.7 APIs

- Janeway's OAI implementation now covers the base specification for OAI-PMH. #1850

10.3.8 Crossref

- Our crossref citation depositor now converts DOIs in URL format to prefix/suffix as this it the only format crossref accepts. #1869

Janeway is developed and maintained and supported by a team at Birkbeck, University of London and the Open Library of Humanities.