

# See Also:

The UBC School of Library, Archival and Information Studies Student Journal  
2015 - Spring

## DIY Journal: Introduction to OJS

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Dual MAS/MLIS

**Keywords:** digitization, ebook, OCR, free software, public domain

### **Abstract:**

A lesson plan for a stand alone workshop designed for university students interested in a hands-on introduction to Open Journal Systems (OJS). Designed to promote knowledge of scholarly publishing and complement the OJS hosting services available through the library.

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# DIY Journal: Introduction to OJS

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## Lesson Details:

This is a stand alone workshop designed for university students interested in a hands-on introduction to Open Journal Systems (OJS). As part of the library's regular instructional programming, the workshop can be used to complement OJS hosting services and promote knowledge of scholarly publishing.

As an open workshop, participants come from across the university community with a variety of motivations for joining the course. Many will be considering starting a new OJS journal or taking an active role in an existing one. Others may be interested in gaining practical experience using this popular platform that powers many thousands of journals worldwide.

- **Unit:** standalone module supporting an existing library service and scholarly information literacy.
- **Audience:** small group of up to 15 participants from the university community, aimed at upper level undergraduate and graduate students.
- **Setting:** instructional computer lab.
- **Length:** 120 minutes (including breaks).

## Purpose:

This workshop provides participants with an introduction to the OJS platform and basic hands-on experience using the publishing platform. While it is not intended to explain the details of organizing or running a journal, it will demonstrate the full

publishing workflow and examine the conceptual basis of the software. This behind-the-scenes look at publishing will demystify the process and give students more confidence to participate in roles as authors, peer-reviewers, editors, and readers.

The workshop also acts as basic training for those interested in starting a journal with the library's journal hosting service, ensuring that they understand the purpose and features of OJS. It contributes to the library's mission of supporting scholarly communication while increasing experiential opportunities for students, bridging the gap between teaching, research, and publishing.

### **Objectives:**

Upon completion of the workshop, participants will be able to:

- Identify journals using the OJS platform.
- Understand the purpose and specific functions of OJS.
- Confidently navigate the OJS interface.
- Create and guide a submission through the OJS publishing process.
- Apply experience to take on active roles in a journal and participate in scholarly communication.

### **Assessment:**

While participants will not be receiving formal marks for the workshop, there are frequent opportunities to demonstrate understanding of the material and receive feedback from the instructor and peers. As each step of the journal project needs to be completed for the lesson to advance, the instructor will monitor activities via the OJS dashboard checking for accuracy. During project time, the instructor will mingle and interact with participants to ensure they understand the details of the process. As participants take on the role of editor in the demonstration journal, they will interact with their groups to ensure tasks are completed correctly. Participation is reinforced by sharing a deliverable (“1-minute essay”) and process outcomes in a

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group project. At the end of the workshop an “issue” of the demonstration journal will be published creating a tangible outcome of the lesson.

## **Preparation:**

To streamline the workshop and ensure the demonstration can be completed in the limited time frame, a few preparatory steps are necessary before the meeting for both the instructor and participants.

- Instructor sets up the demonstration journal including example policies, descriptions, and demo issue.
- Instructor sends out email to registered participants with instructions to visit the library's OJS page and create an account.
- Participants should create their own account following the instructions and briefly explore the journals hosted by the library.
- Instructor checks the system just before the workshop to ensure all participants have an account, and adds them to the demonstration journal.

## **Classroom Resources:**

The workshop is held in an instructional computer lab with workstations for all participants and the instructor. Participant computers have internet access, web browsers, PDF readers, and word processing. The instructor's computer has presentation software, internet access, web browser, word processing, and a projector with a large presentation screen. The university library has an OJS hosting service and has set up an instance for the workshops.

The workshop utilizes presentation slides and four handouts to provide orientation for the participants.

- **Presentation slides:** provide clear markers of location in the lesson and an outline of the current activities. These are supplemented by a projection of the instructor's screen logged into OJS to demonstrate each activity.

- Handout #1: **Account Setup** (email). Sent out to participants in advance via email, this document gives step-by-step instructions to create an account on the library's OJS page. This is a general account that can be assigned roles in the demonstration journal during the workshop.
- Handout #2: **Exploring OJS Journals Activity** (PDF). Describes the step-by-step process to browse OJS journals on the Directory of Open Access Journals and outlines the “1-minute essay” activity.
- Handout #3: **Journal Project** (PDF). Describes each stage of the journal project including step-by-step instructions for using the OJS interface and expected outcomes of each stage. The stages are divided based on the different roles the participants will practice in the demonstration journal. The four sections of the project are clearly distinguished.
- Handout #4: **OJS Resources** (PDF). Provides links to: 1) OJS software documentation and video tutorials, 2) resources describing the process of setting up a student run journal and ensuring sustainability, 3) resources describing the use of student publishing as educational activity.

**Lesson Activities:**

Activity	Resources Used
Workshop Introduction (lecture, 5 min) <ul style="list-style-type: none"> <li>• Welcome</li> <li>• Agenda—provide clear outline of the workshop, ensure participants have downloaded the handouts folder.</li> <li>• Instructor will set the tone of a participatory workshop, explicitly welcoming questions and discussion.</li> <li>• One minute definition of OJS.</li> </ul>	Instructor: Presentation slides
Exploring OJS Journals, (individual activity, 10 min)	Participants:

<ul style="list-style-type: none"> <li>• Activity to start thinking about OJS, getting a sense of what OJS based journals look like and the broad scope of use.</li> <li>• Instructor introduces the activity and invites participants to use the handout or follow along on the projector. Participants visit the Directory of Open Access Journals (DOAJ) and browse OJS based journals. They select one to examine more closely and explore the journal's website. They are prompted to pay attention to the basic OJS features, such as current/archives issues, sections, policies, and side bar menus.</li> <li>• Participants are asked to write a “1-minute essay” with a link to the journal they selected, a basic description, and any reflection or interesting notes—have fun and be prepared to share. The document will be used as a submission to the demonstration journal: they should not put their name on it (as if for blind peer-review), and save it as PDF for submission.</li> </ul>	Exploring activity handout (PDF)
<p>Sharing and Introductions (small group activity, 10 min)</p> <ul style="list-style-type: none"> <li>• Participants form small groups of approximately three to four people depending on class size.</li> <li>• Introductions plus report on Exploring activity—participants are asked to say their name, department, and interest in the workshop, then share their findings and reflections from the explore activity.</li> <li>• Instructor will mingle with the groups listening and posing questions to get a basic feel for the make up of</li> </ul>	

<p>participants and to break the ice. Does anyone have experience using OJS?</p> <ul style="list-style-type: none"> <li>• Instructor will wrap up the discussion by asking for some summaries from the groups and the common OJS elements they observed.</li> </ul>	
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<p>PKP/OJS Introduction (lecture, 5 min)</p> <ul style="list-style-type: none"> <li>• Introduce Public Knowledge Project, why OJS was created, and who uses it.</li> <li>• Discuss student publishing as a learning opportunity and support for critical literacy.</li> </ul>	<p>Instructor: Presentation slides</p>
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<p>Journal Setup Demonstration (lecture, demo, 10 min)</p> <ul style="list-style-type: none"> <li>• Explain OJS's “Five Steps to a Journal Website”, outlining the initial setup for the demonstration journal.</li> <li>• Participants will generate and vote on a name for the journal.</li> <li>• The instructor will quickly step through the Five Steps web forms, but the content will already be filled in. The instructor will explain the concept behind the process which ensures the organization has all the necessary policies in place. Instructor demonstrates how these entries are displayed on the public journal page. This reinforces the purpose and meaning of the standard OJS web page sections that participants encountered during the Exploring activity.</li> </ul>	<p>Instructor: Presentation slides</p>
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<p>Workflow Overview (lecture, demo, 5 min)</p>	<p>Instructor:</p>
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<ul style="list-style-type: none"> <li>• Explain the OJS publishing workflow, display a diagram of the process, and outline the OJS roles (Journal Manager, Editor, Reviewer, Author, Reader).</li> <li>• Instructor, as manager of the demonstration journal, demonstrates assigning multiple roles to user accounts in the system, and assigns roles (Author, Editor, Reviewer) to the participants.</li> <li>• Instructor ensures that the participants are logged into the demonstration journal.</li> </ul>	<p>Presentation slides Participants: OJS account log in (previously set up)</p>
<p>Journal Project Part 1: Authors (individual activity, 10 min)</p> <ul style="list-style-type: none"> <li>• Introduce the user interface and selecting a specific role.</li> <li>• Participants follow the steps to submit their 1-minute essays to the demonstration journal as Authors. These submissions become the “articles” for the journal.</li> </ul>	<p>Participants: Journal project handout (PDF)</p>
<p>Break, individual questions, catch up (10 min)</p>	<p>Snacks, coffee</p>
<p>Journal Project Part 2: Editors (pairs/small group activity, 8 min)</p> <ul style="list-style-type: none"> <li>• Participants form pairs or small groups depending on class size.</li> <li>• The Journal Manager (instructor) assigns one article to each Editor (participant). Introduces the submission page.</li> <li>• Each participant assigns their partner as Reviewer for the article and sends out a notification.</li> </ul>	<p>Participants: Journal project handout (PDF)</p>
<p>Journal Project Part 3: Peer-reviewers (individual activity, 7 min)</p>	<p>Participants: Journal project</p>



<ul style="list-style-type: none"> <li>• Participants complete “peer-review” of their assigned article and submit comments to the system.</li> <li>• Instructor highlights how the system can implement double blind review and other policies.</li> </ul>	handout (PDF)
<p>Journal Project Part 4: Editing (pairs/small group activity, 10 min)</p> <ul style="list-style-type: none"> <li>• Participants complete the Editing steps on the submission page for their assigned article (Record decision, Notify Author, Copyediting, Scheduling, Proofreading). They will not actually do any editing, but only advance the article through the process.</li> <li>• Instructor highlights the details of the submission page and how it is used to organize editing tasks, maintain records, and record actions.</li> </ul>	Participants: Journal project handout (PDF)
Break, individual questions, catch up (5 min)	
<p>Publishing Demonstration (lecture, demo, 15 min)</p> <ul style="list-style-type: none"> <li>• Once all articles have been pushed through the system, the group reconvenes.</li> <li>• Instructor reviews the completed workflow steps to reinforce the process.</li> <li>• Instructor explains and demonstrates the final steps to publish an issue. Creates issue one of the demonstration journal.</li> </ul>	Instructor: Presentation slides
<p>Wrap up (lecture, discussion, 10 min)</p> <ul style="list-style-type: none"> <li>• Final questions, discuss any issues that arose, reflect on the process.</li> <li>• Explain library's OJS hosting program.</li> </ul>	Instructor: Presentation slides Participants: Resources handout

<ul style="list-style-type: none"> <li>• Share resources.</li> <li>• Ask for feedback on anonymous forms.</li> </ul>	(PDF)
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## Justification:

OJS is a powerful tool for scholarly communication that enables professional publishing for a multitude of voices without the infrastructure of traditional publishers. However exciting the outcomes, the actual workflow is tedious and filled with repetitive steps carried out on a dull and confusing interface. Creating an interesting and engaging workshop to teach basic OJS usage is challenging, but will make a valuable impact to critical literacy and learning opportunities.

One of the challenges is trying to understand who will attend the workshop. Participants will have diverse backgrounds, academic levels, interests, learning styles, and expectations. They are unlikely to have any prior knowledge of using OJS. However, since the participants are university students, I do make a variety of basic assumptions. For example, I assume they have basic computing skills such as using a browser and word processor, understand the concept of logging into a secure system, and are familiar with academic journals and basic concepts of scholarly publishing.

The participants will have a variety of motivations for pursuing the workshop and different end goals in mind. Some may be interested in starting a student run journal, working for a journal, or taking part in peer-review. Others may be interested from a more theoretical point of view, wanting to see behind-the-scenes to better understand publishing. With this diversity in mind, it is necessary to make the learning experience very practical, flexible, and accessible. It will not focus on the theory or analysis, but will be grounded in active experience using the software. I started with the basic objective that participants will gain experience navigating the OJS interface to create and guide a submission through the publishing process. This suggested the

lesson requires a very hands-on project approach, rather than a lecture or pure demonstration.

Working backwards from the basic objective, I wanted to see how the learning would integrate with larger library goals and information literacy. First, the workshop publicizes an existing library service and equips users with basic skills necessary to utilize it. Secondly, it supports scholarly communication within the university, as OJS can provide a platform of integrating teaching, research, and publishing. Student journals provide valuable experiential learning opportunities and professional exposure. Experience using the system enables participants to confidently submit articles or register as peer-reviewers. Thirdly, it supports critical information literacy by demystifying the publishing process and tools. Participants will gain experience in what is probably the world's most popular publishing software and will recognize the basic features in journals from around the world. They will see how policies such as double-blind review are enacted by software and impact the publishing process.

Reflection on these learning possibilities could provide materials for an entire course—even to cover my basic objective I had some concern about overloading participants with too much information in one session. Potentially, the activities of the publishing process could be broken into multiple lessons allowing more detailed investigation of each step and the conceptual background. However, the lesson is constrained by the workshop format and it is unlikely that participants would find time to schedule multiple dates to complete the course. Although I could choose a single stage of the process to focus on, I felt it would be more satisfying to complete the entire workflow, thus having a concrete “issue” as an outcome at the end of the session. Furthermore, completing the full process gives participants an awareness of the publishing life-cycle, while reinforcing understanding of the interface by repetition. This ensures they are familiar with the mechanics/paradigm of the OJS interface and can master the basic navigation.

As it is not necessary to memorize the exact details of each separate step, the cognitive load is reduced by providing clear step-by-step instructions for all activities. Careful attention will be spent developing this documentation to ensure it is useable for the workshop context, as well as a useful reference outside of class. Each stage of the journal project is organized by the role the participants are taking in the demonstration journal and is represented on a separate page of the step-by-step handout to clearly indicate divisions of the activity.

Deciding the exact time frame and scope required careful thought to maximize the impact of a short, standalone lesson (Houlson, 2007). Most library workshop offerings are either 90 minutes or 120 minutes. While I was tempted to create a lesson that went for 180 minutes, I felt this time commitment would significantly lower the accessibility, risk losing engagement, and present too much information for one session. The 120 minute block allowed for enough time to cover the basic workflow and include short breaks.

The timing of the journal project activity required special attention. The OJS workflow is mechanical and procedural, so it appears more complex than it is. The entire journal project could be completed in a few minutes if the editor raced through. My timings are flexible in order to balance participants feeling too rushed on each step versus becoming bored if they completed it ahead of others. Including the break times, there are 50 minutes allotted to the journal project. This should be sufficient to walk through the steps with time for the instructor to demonstrate, participants to ask questions, and the instructor to guide reflection on important aspects of the process. While the lesson moves at a brisk pace, the break times provide a cushion to work through any issues that arise for individuals or the group.

The activities were selected to support the objectives with engaging and interesting learning experiences. The first activity, Exploring OJS Journals, is an activation exercise designed to stimulate reflection about the topic. Being exposed to an OJS

based journal will give participants a mental model of what the final product looks like and how the journal project activity relates to the outcome. Browsing the DOAJ highlights the diverse possibilities of the OJS and allows participants to discover something relevant to their interests.

The 1-minute essay is a method to prompt reflection and analysis, which is then integrated into further parts of the lesson. Sharing their discovery with a small group provides the opportunity for further articulation while exposing the group to a diverse range of resources. It is also a simple introduction and icebreaker activity to build rapport. Since the 1-minute essay is used as an “article” submission for the journal project, the reflections are a constant reminder through out the lesson.

The journal project focuses on learning by doing. Since learning the tedious interface is the main challenge (and objective of the lesson), this hands-on experience is easier to remember than an abstract presentation of the publishing process. Most of the steps are completed in pairs or small groups which helps reinforce understanding of the tasks through sharing and articulating the ideas. Full participation and collaboration is reinforced by individual responsibilities for specific outcomes at each step that contribute to the final completion of the journal project.

Overall, the workshop presents a mix of lecture, discussion, and hands-on activity that should appeal to a variety of learners. Most stages are flexible to multiple learning approaches with self direction. For example, the activity handouts provide step-by-step instructions for those who will feel most comfortable with explicit written directions, while those with a more hands-on style can jump straight into the software to fiddle around. Most activities are also modelled by the instructor on the main screen for those who learn better by visual example. The workshop format and group project to “publish” a journal issue allows causal interaction and collaboration with peers and instructor.

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**OJS Resources:**

PKP School, <http://pkpschool.sfu.ca>

Open Journal Systems, <https://pkp.sfu.ca/ojs>

Open Knowledge: Changing the Global Course of Learning, Stanford University, “Module 12: Student Publishing: Lessons in Publishing, Peer Review, and Knowledge Sharing”,

<https://class.stanford.edu/courses/Education/OpenKnowledge/Fall2014/courseware/67c5b4a02ba3459089aec913ccc4a310/1f9ffc47da024025972d2db74c07f127>

[example handout]

## Exploring OJS Journals Activity

Open Journal Systems is used by more than ten thousand journals worldwide! To start thinking about OJS and its diverse adoption, visit the Directory of Open Access Journals (DOAJ) and select one OJS based journal to examine. Please note that not all OJS journals are open access and there is no central listing of users of the system—thus, the results of this search are only a small fraction of the actual OJS journals in existence.

1. Go to the **Directory of Open Access Journals**, <http://doaj.org>
2. Type “OJS” into the search box, uncheck “articles,” and press return. You should find over a thousand journals, *most* of which are hosted using OJS. This represents only a small fraction of actual users. Note: older entries to DOAJ may list OJS in a metadata field “Platform, Host, Aggregator”, but this information is no longer required.
3. Using the search facets on the left side of the results list, click **Full Text Language** and choose a language you understand. Take note of how many different languages are represented. South America has the highest rates of adoption of OJS and open access.
4. Click **Subject** and choose something of interest.
5. Browse the listings to get an idea of the broad range of organizations using OJS to publish.
6. Choose a journal that sounds interesting and visit the home page.
7. Spend a few minutes exploring the site. Check out the various section and try to learn about the journal.

For example: Where is it based? Who manages the journal? What type of



content do they publish? How many issues have they published? Is there anything interesting in the current issue? Can you find information about their policies? What do you think about the interface?

8. Compose your thoughts into a “1-minute essay” using a word processing application. Give a link to the journal home page and few pieces of information in prose or bullet points. This tiny document will become your submission to our demonstration journal—so have fun with it and be prepared to share! Do not put your name on it.
9. Save your “1-minute essay” as a PDF.