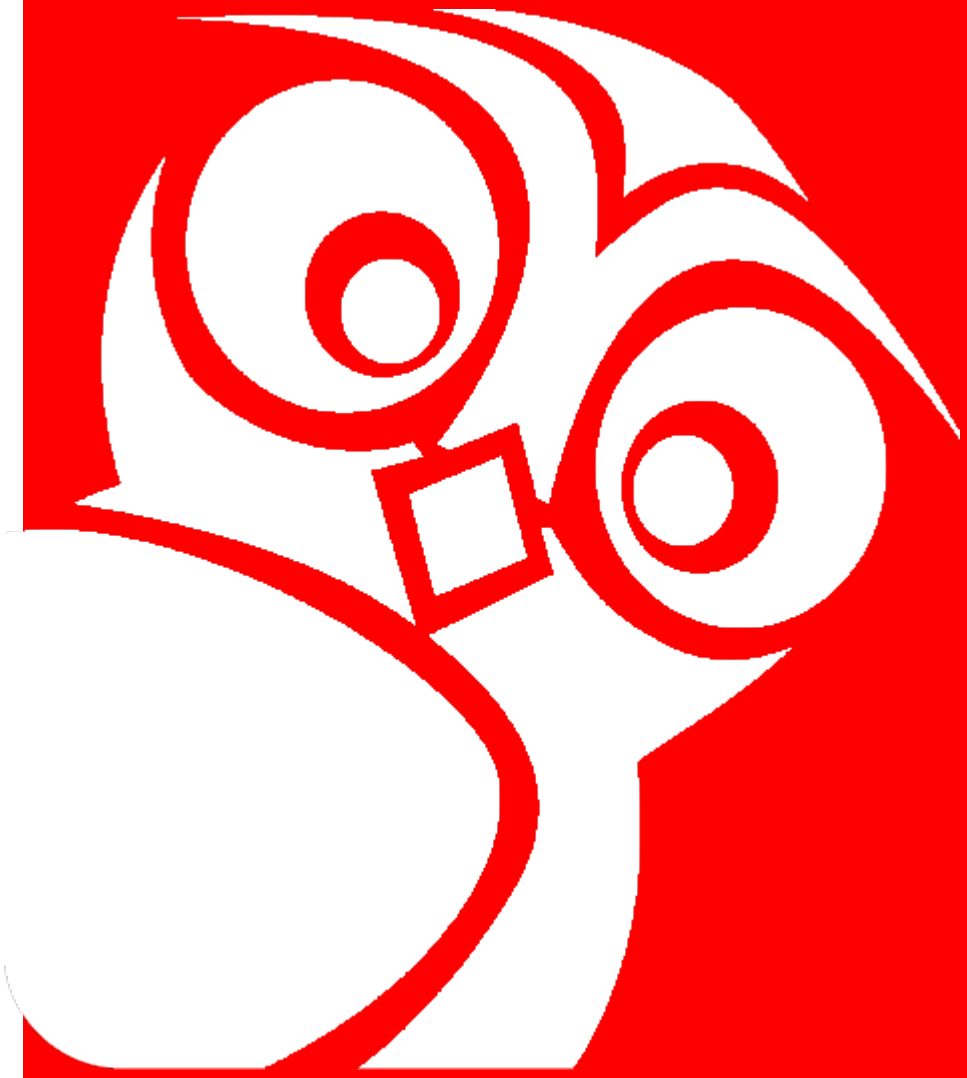
HYPERJOURNAL HOWTO



A beginner's guide to HyperJournal 0.4

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Copyright and trademark information

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Feedback

Please direct any comments or suggestions about this document to:

info@hjournal.org

How to obtain further support

You can subscribe to the “Users” mailing list at:

http://www.hjournal.org/mailinglist

Please note that the “Users” mailing list is bi-lingual, both the English and Italian languages are accepted.

Introduction to HyperJournal

HyperJournal is an Open Source web application that facilitates the administration of academic journals on the Web. It facilitates the installation, personalization, and administration of a dedicated Web site at extremely low cost and without the need for special IT-competence. HyperJournal can be used not only to establish an online version of an existing paper periodical, but also to create an entirely new, solely electronic journal.

This manual refers to HyperJournal version 0.4.

HyperJournal Features

- Online submission and content management.
- Graphic design which is user-friendly and easily customizable.
- Anonymous article submission.
- Anonymous on-line peer-review.
- Subjects management.
- Unlimited number of scientific and editorial committee.
- Plurality of permitted file formats (which can be restricted according to your needs): XML, HTML, LaTeX, MS Word, PDF, PS, JPEG, GIF, PNG.
- Compliance with the Open Archive OAI-PMH protocol.
- Customizable editing-publishing stage.
- Conversion of XML or LateX articles into HTML or PDF version.
- Entirely modifiable style sheets for visualizing and printing articles.
- Validation and article conversion tools for registered users.
- Dynamic Contextualization.

HyperJournal Workflow

The HyperJournal publication workflow differs from most on-line peer review systems because of the complete anonymity of the manuscript submitters during the process of evaluation.

As you will notice, in HyperJournal the submission of a manuscript takes place while the user is logged-off so that there is no way for the system (and its managers) to know the identity of the submitter. This is done to encourage fairness during evaluation; unfortunately, this model has some side effects, the most important being the impossibility of notifying submitters by e-mail of the approval or refusal of their manuscript. The reason for this impossibility is that the submitter is completely anonymous therefore the system does not know their e-mail address during the evaluation phase. Instead, it is the submitter's responsibility to periodically check the journal's list of approved manuscripts which are waiting for attribution (see below).

After the evaluation phase, the submitter logs into the system and attributes the reviewed manuscript to themselves by choosing their manuscript from the list of approved ones and by entering a password chosen during submission of that particular manuscript.

SUBMISSION

A user submits their manuscript to the Journal web site. During this process he is asked to enter the metadata of the manuscript as well as the full-text file. Furthermore, being the submission anonymous, the user is asked to enter a password which is associated with the manuscript, in order to recognize their contribution after peer-reviewing.

PEER REVIEW

From their workspace, the reviewer can approve or reject the manuscript; he can also write an evaluation report.

AUTHORSHIP ATTRIBUTION

Once the manuscript has been approved, the submitter can see their article pending for attribution in the list of accepted contributions. The submitter can then attribute authorship to the article by entering the name(s) of the author(s) and the password previously chosen for the manuscript.

EDITING

From their workspaces, the editors and the submitter cooperate in the copyediting and proofreading phases, including "citation indexing".

PUBLISHING

Can be scheduled or manual.

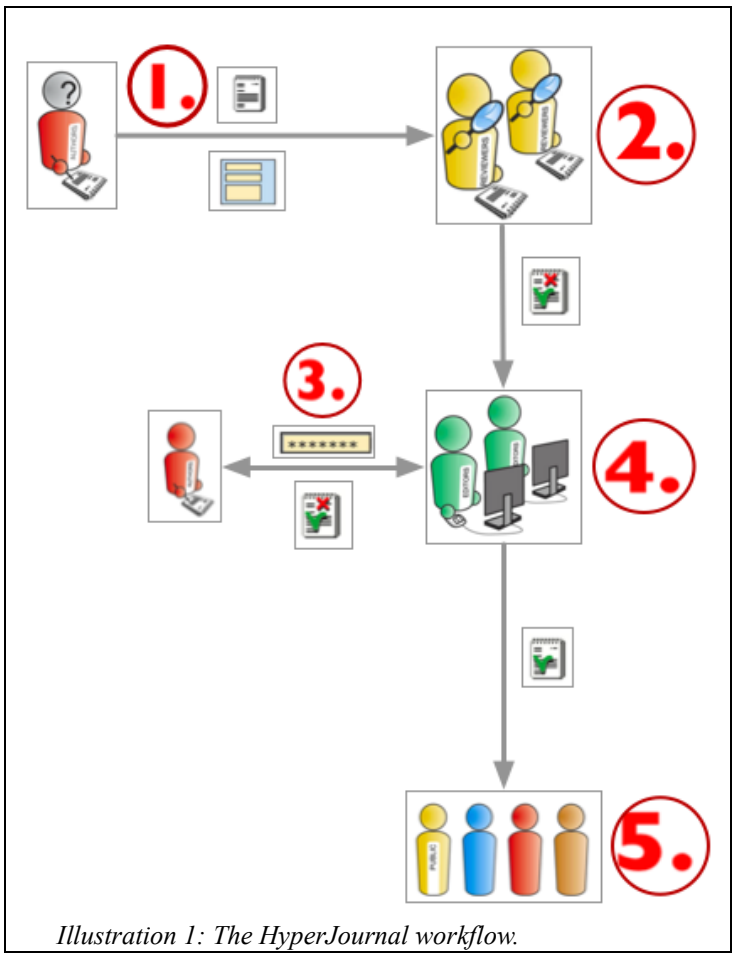

Illustration 1: The HyperJournal workflow.

The Editing phase of the editorial process, outlined above, can be easily customized and adapted to different content management organization needs as described in the following.

Please note that although there are currently (in version 0.4) no graphical interfaces to

do so, the HyperJournal workflow can be heavily customized to fit the particular editorial structure of each journal. Future versions will include easy and powerful tools to customize the journal workflow.

Editorial Roles

The HyperJournal has three pre-defined roles:

1. the Administrator (Admin group): Configures the Web Site and sets up the journal and staff editorial roles;
2. the Reviewer (Scientific Committee group): Performs peer-reviewing;
3. the Editor (Editorial Board group): Performs copyediting, proofreading, layout editing.

These pre-defined roles should suffice for most small journals; however, if your journal has a different editorial structure you are free to fully customize roles and their permissions. Editorial roles are completely flexible and easily customizable by the Journal Manager, aggregating different permission sets (see Appendix A). The procedure is described in the “HyperJournal for Journal Managers” section (see below).

System Requirements

A server environment meeting the following requirements is required (please consult the installation manual for detailed information):

- Linux (Debian suggested), Mac OS X10.2 or higher, *BSD, any flavour of Unix.
- Apache 1.3 or 2.0
- Php >= 5.* (with GD and libjpeg enabled)
- Tomcat >= 5.*
- Sesame = 1.1 (Caution: Sesame 1.2 or newer IS NOT supported)
- Mysql >= 4.1

The following PHP Pear packages:

- Main
- DB >= 1.7.0
- File
- HTTP
- HTTP_Session
- HTTP_Request
- HTTP_Header
- NET_Socket
- NET_URL
- HTML_TreeMenu

Software demo

A full-featured HyperJournal demo giving access to nearly all HyperJournal features is available at the following URL:

http://www.hjournal.org/demo

Please note that any changes made to the content are automatically removed once a day.

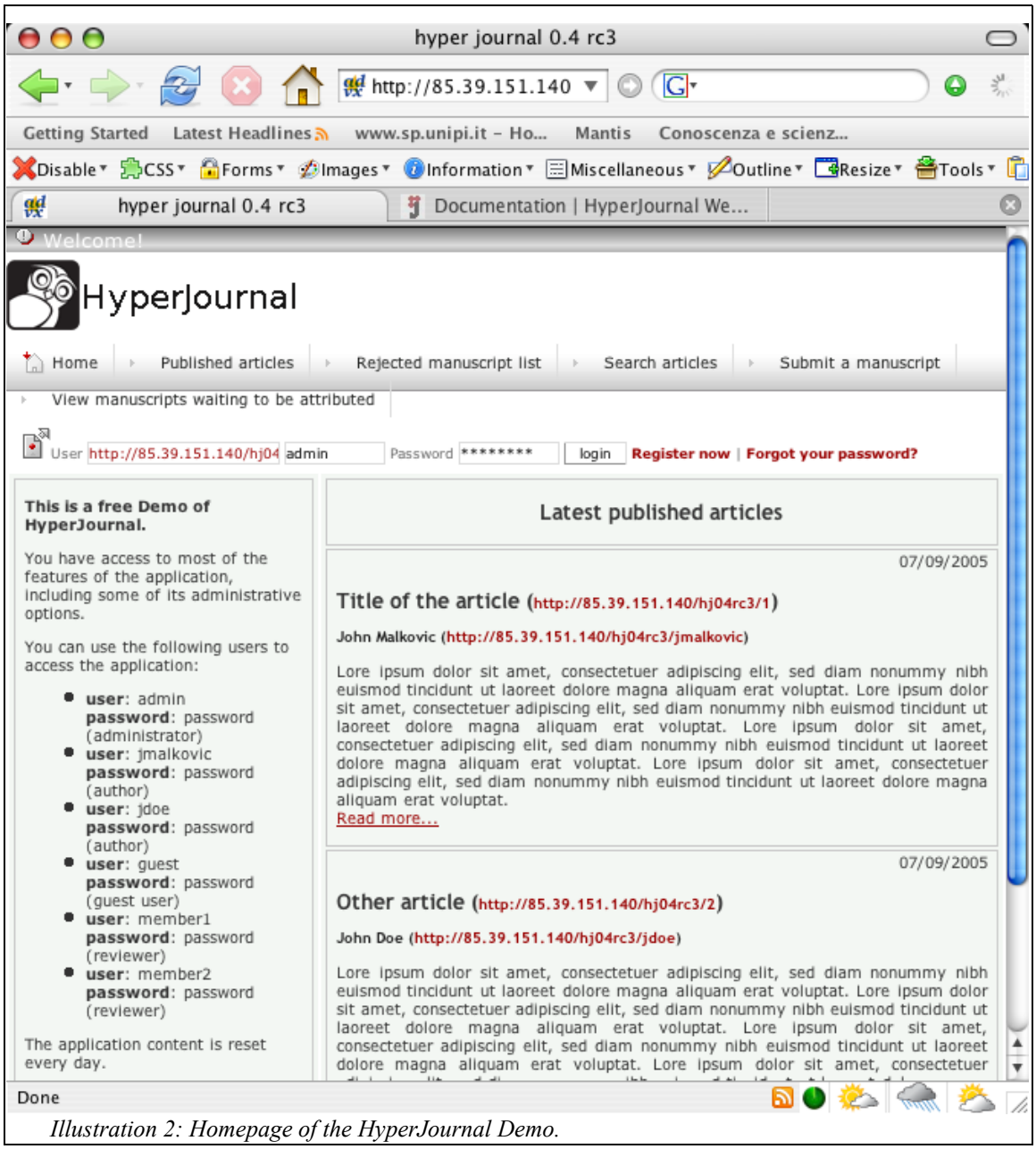

Illustration 2: Homepage of the HyperJournal Demo.

HyperJournal for Readers

Register with a HyperJournal

This introduction describes how to access the registered users area, for all roles mentioned in the following. In order to log into the Journal web site and participate in the publishing process, all users (scientific committee and editorial board members as well as authors) MUST be registered.

The registration procedure requires a few minutes. At the end of this phase, you will receive a confirmation e-mail. Please read carefully the instructions contained in the e-mail, and complete the registration.

To register to a Journal using HyperJournal, follow the link Register now in the home page.

Start User Registration

In the first window, you are asked whether you are already registered to any other Journal using HyperJournal which is a member of the same Contextualization Federation as this one. Accept the pre-selected choice ("No") if it is the first time that you have registered with this Journal or with a Journal which belongs to the same Contextualization Federation. [The single log-in feature for groups of journals in the same federation is disabled in version 0.4, so please always choose "No"].

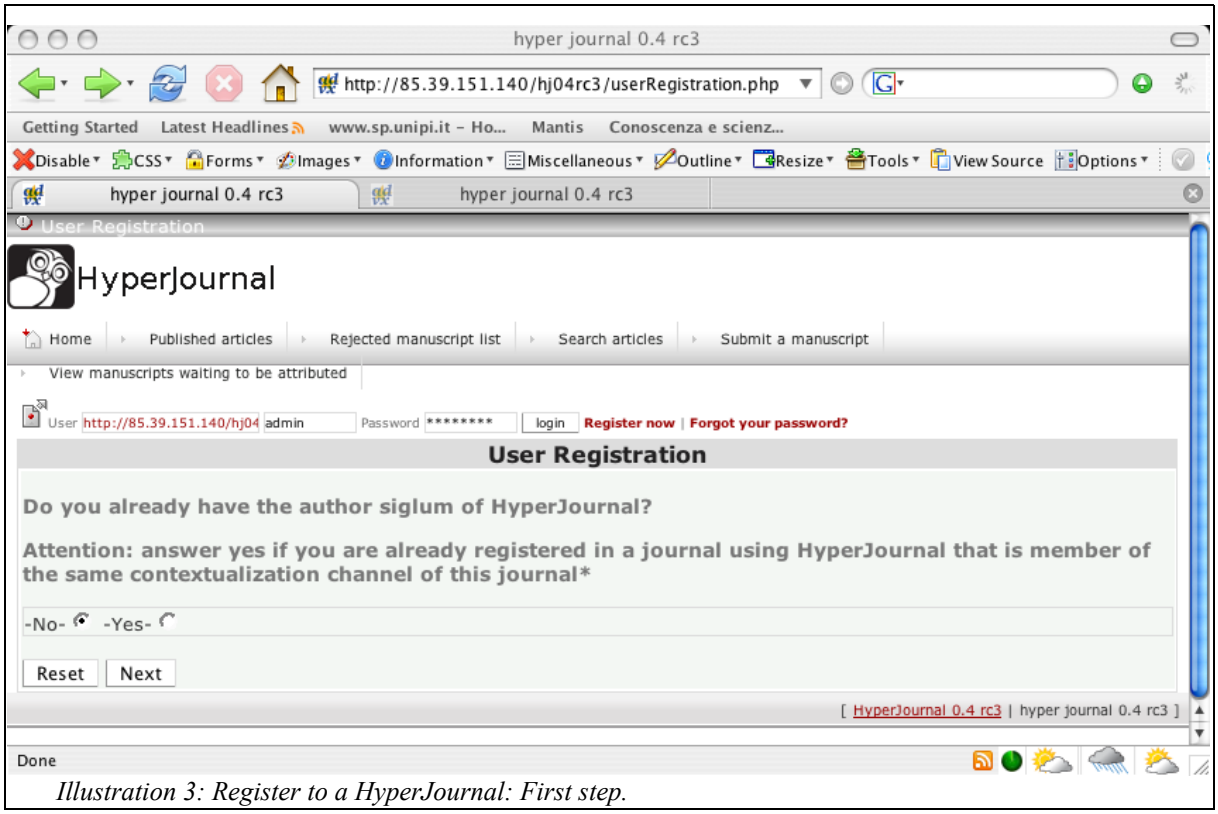

Illustration 3: Register to a HyperJournal: First step.

Insert Personal data

In order to proceed, enter your name, surname, a password and your e-mail address. Please note that all fields are required.

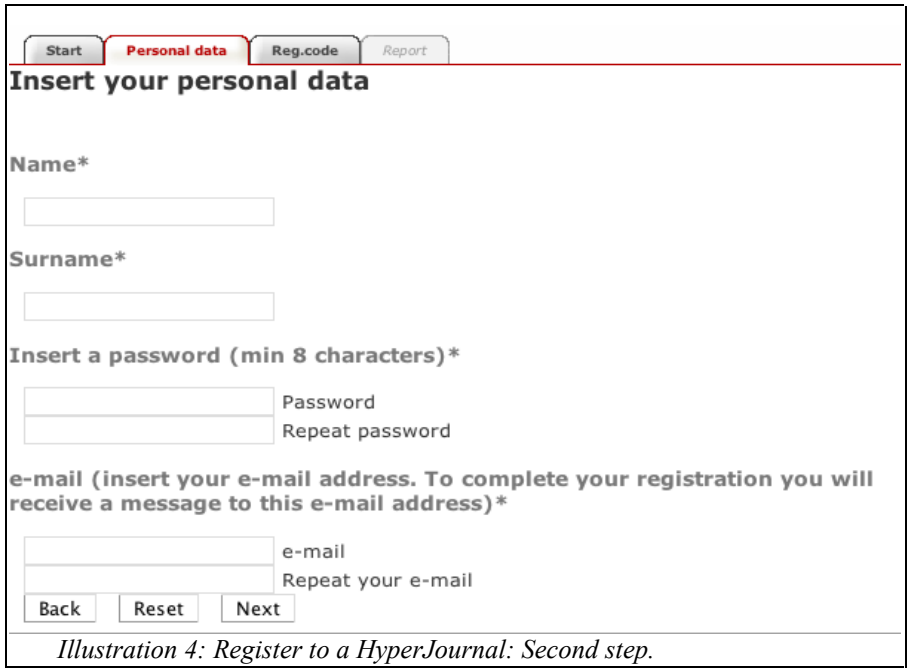

Illustration 4: Register to a HyperJournal: Second step.

Verification Code

Please, type the five chars displayed in the following window, and click on the Next button. You can actually forget about this code: this step is only necessary to prevent robots and other automatic agents to register with the journal.

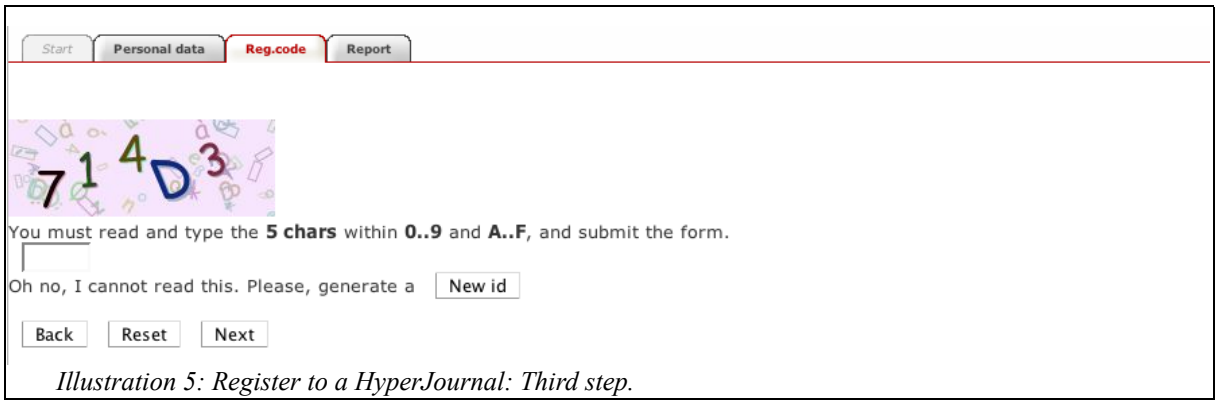

Illustration 5: Register to a HyperJournal: Third step.

Confirmation e-mails

In the last window, click on the End button.

Illustration 6: Register to a HyperJournal: Confirmation message.

You will receive a confirmation e-mail. Follow the instructions contained in the message. You will receive a second confirmation e-mail with your username.

If you forget your password, click on “Forgot your password?” on the home page.

Log into a HyperJournal

Once you have registered with your Journal, enter your username and password in the boxes on the top-left.

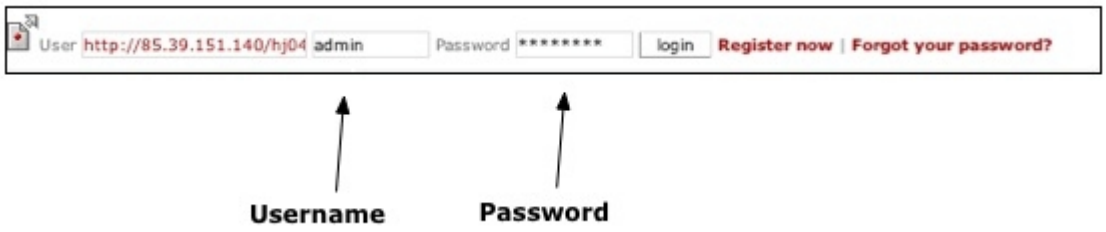

Illustration 7: The HyperJournal login form.

Your complete “siglum” (which is the HJ authors unique identifier) is your journal URL + your username. Click on the Login button to enter your workspace.

Notice If you registered your siglum with another journal which is part of the same Contextualization Federation as this one, you can log in with your original siglum. To do so, enter the URI of the journal where you originally registered your siglum in the leftmost textbox.

HyperJournal for Journal Administrators

Getting Started

After logging into your HyperJournal account, select the Journal Configuration panel in the left side of your workspace:

Illustration 8: The user menu.

From Journal Config, you will access the Control Panel and the Sigla equivalence panel. We'll first describe the Sigla equivalence feature and then examine the options of the Control Panel.

Sigla equivalence

The Sigla equivalence assignment allows you to define an equivalence between the sigla of two authors. This is useful in case the same author registers twice with your journal or if a newly registered author is already listed in the external author list. Let suppose, for example, that an individual named A (with a siglum www.example.com/a) has already been registered as external author and that he is the author of an article published in your journal. If, after some time, A registers to your journal and gets the siglum www.example.com/a1, you may want to declare the equivalence of the former and latter siglum (www.example.com/a = www.example.com/a1) so that the system knows that the two sigla identify the same author. Please be careful not to abuse the usage of the authors equivalence explicitation because this mechanism is very computational-intensive and can also lead to inconsistencies. Think of it as an extreme measure and try other ways first to discourage your authors from registering with your journal twice.

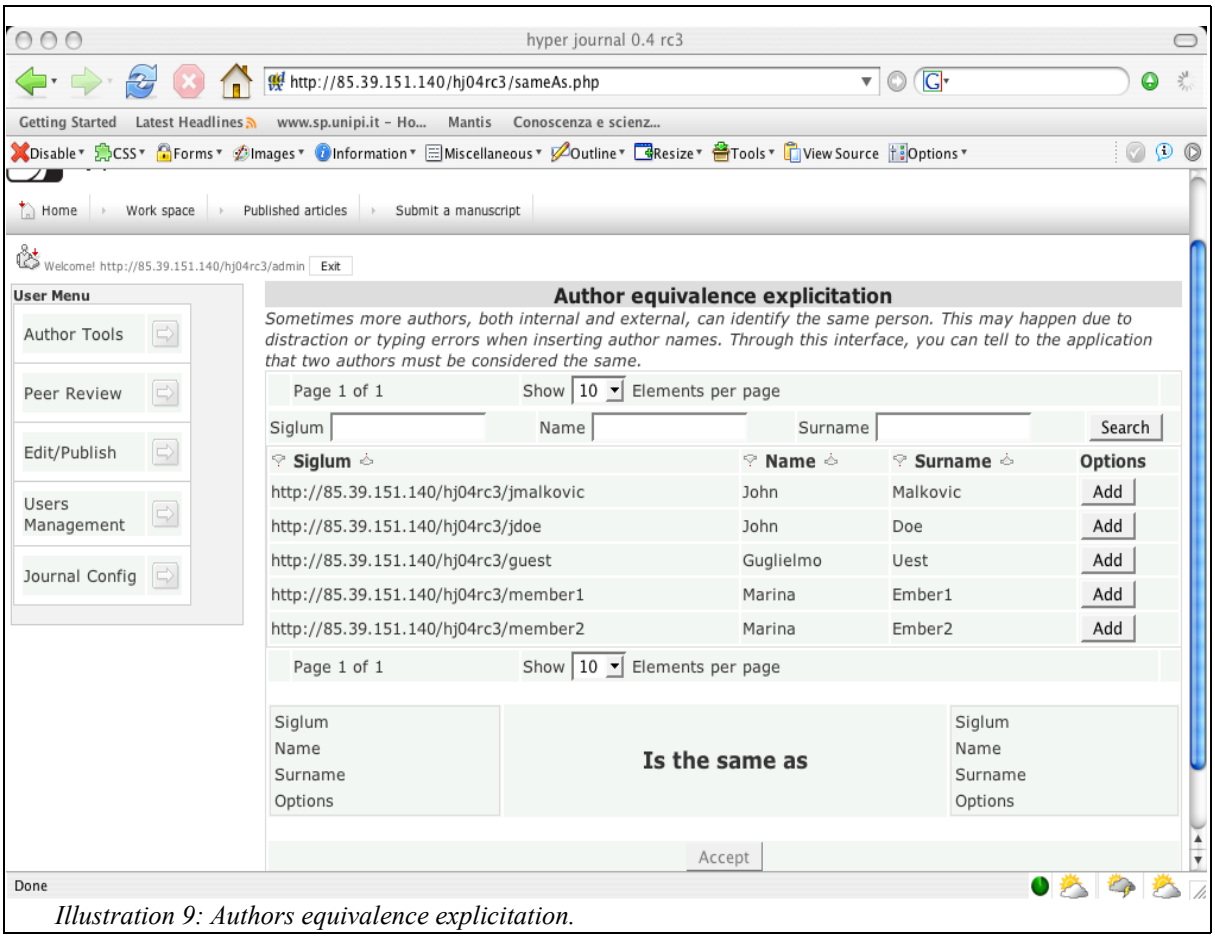

Illustration 9: Authors equivalence explicitation.

Control Panel

The Control Panel includes several options regarding both the administration of the web site and the editorial organization (policies, structure, etc.) of the journal. Therefore, we will distinguish between Web Site Administration options and strict Journal Management options.

Web Site Administration options

As you can see in the following figure, the Web Site Administration functions are:

- Journal Options menu,
- Database and File System Options menu,
- OAI and Dynamic Contextualization menu.

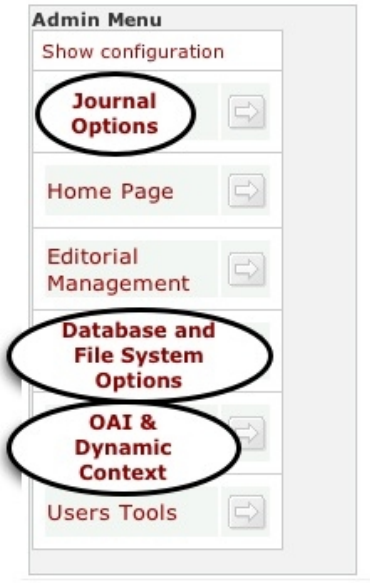

Illustration 10: The Admin Control panel.

Journal Options menu

In the Journal Options Menu, you will find the following functions:

- Change Admin password,
- Change Admin e-mail,
- Journal languages,
- Interface Themes,
- Title of the Journal,
- Other options.

In the following figure, you can see the configuration interface of the Journal's title, language, logo and graphical theme. Administrators can choose an existing theme, or create a new one.

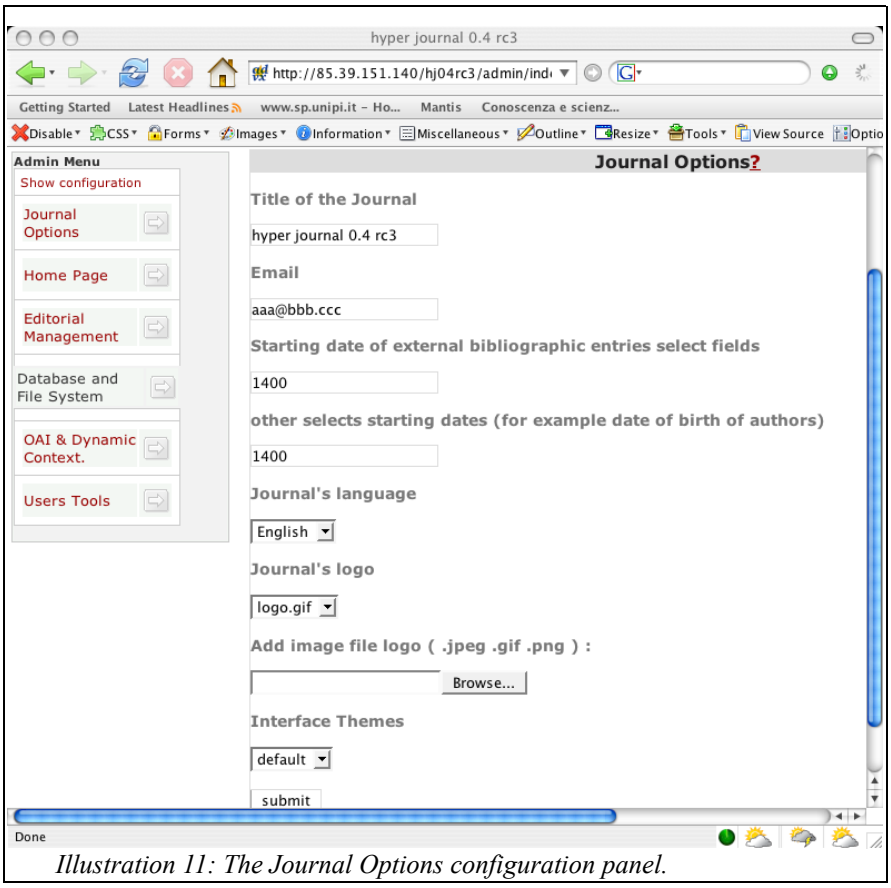

Illustration 11: The Journal Options configuration panel.

Database and File System

Caution Do not change the values of this panel unless you know exactly what you are doing. A wrong configuration here can prevent the entire function from working.

From this panel, you can configure some parameters such as

- Locations,
- Database,
- Sesame,
- Encryption.

The following figure shows the location settings of the HyperJournal demo site. In the Database and Sesame panels there are other similar configurations.

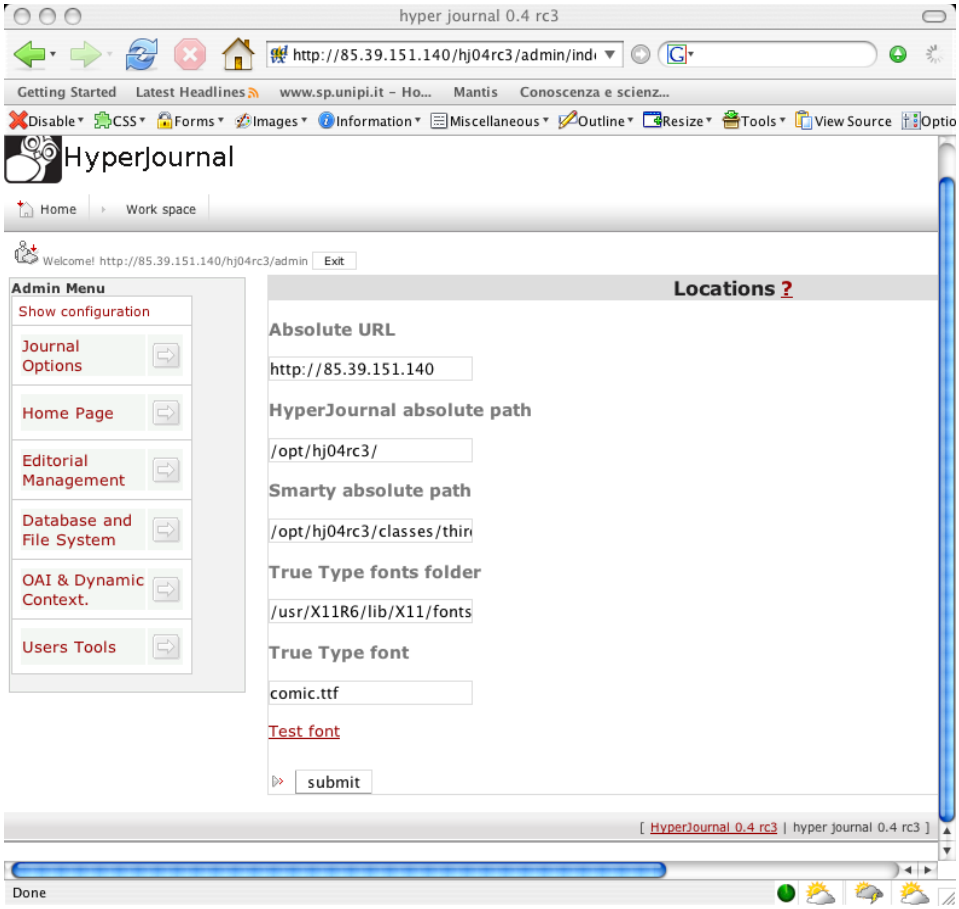

Illustration 12: The Locations configuration panel.

OAI & Dynamic Contextualization

Here you can activate OAI-PMH compliance and/or Dynamic Contextualization. In the current version (0.4), the only working setting is the Earliest timestamp. This is used to determine the publishing date of the first item (article) of your repository. This date must be in the yyyy-mm-dd format. Please refer to http://www.openarchives.org for additional details about this setting.

To find out more about the Dynamic Contextualization configuration (which is enabled by default and cannot be disabled in version 0.4), see the installation manual.

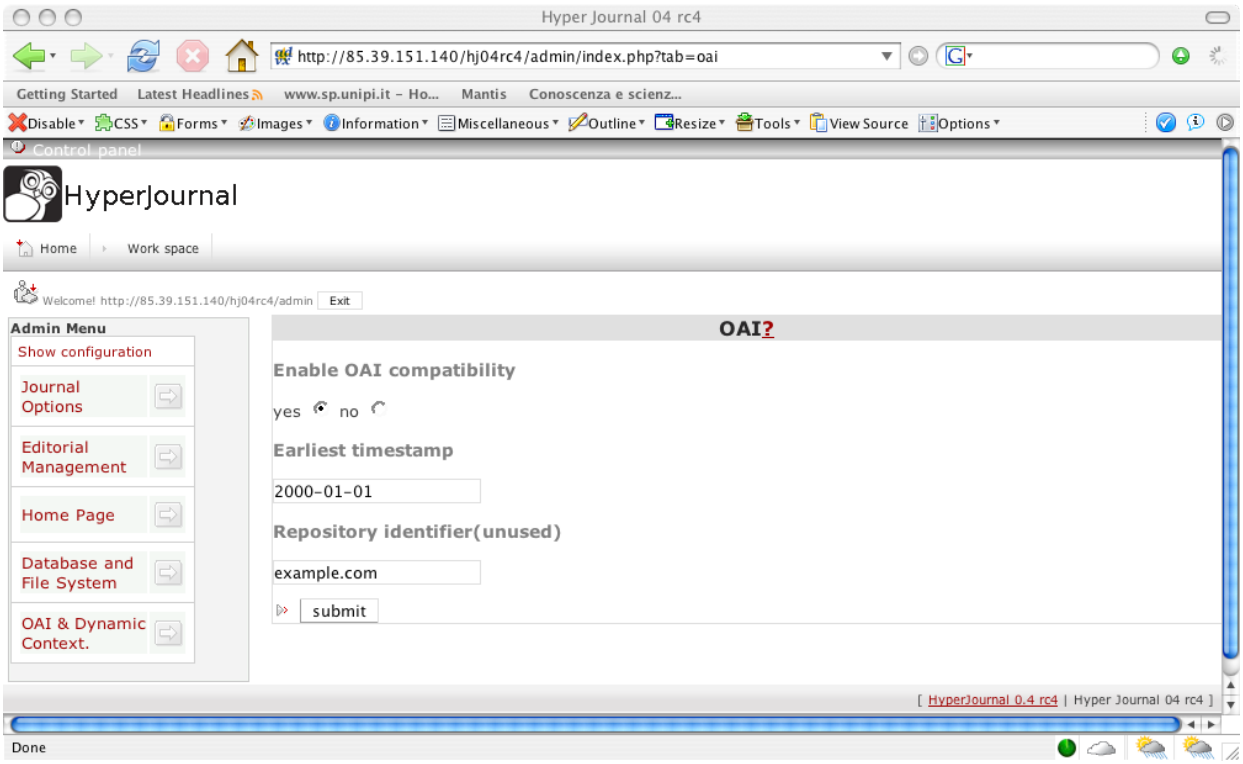

Illustration 13: OAI.

Journal Management options

The Journal Management options in the Control Panel are the following:

- Editorial Management,

- Home page.

Illustration 14: The Admin control panel menu.

Editorial Management

In the Editorial management menu, the following actions are included:

- Roles and permissions,
- Publication criteria,
- Peer review settings,
- Contribution file types,
- Enable licenses for this journal,
- Enable languages,
- Edit sections.

Roles and permissions

By selecting this panel, you can create new roles and assign them permissions. In the right part of the web page there are all the permissions grouped by category. A complete and detailed list of permissions is available in Appendix A.

Adding a new role is simple: enter the role name, as shown in the figure, and click submit. Select one or more permissions for this role and then click Submit again.

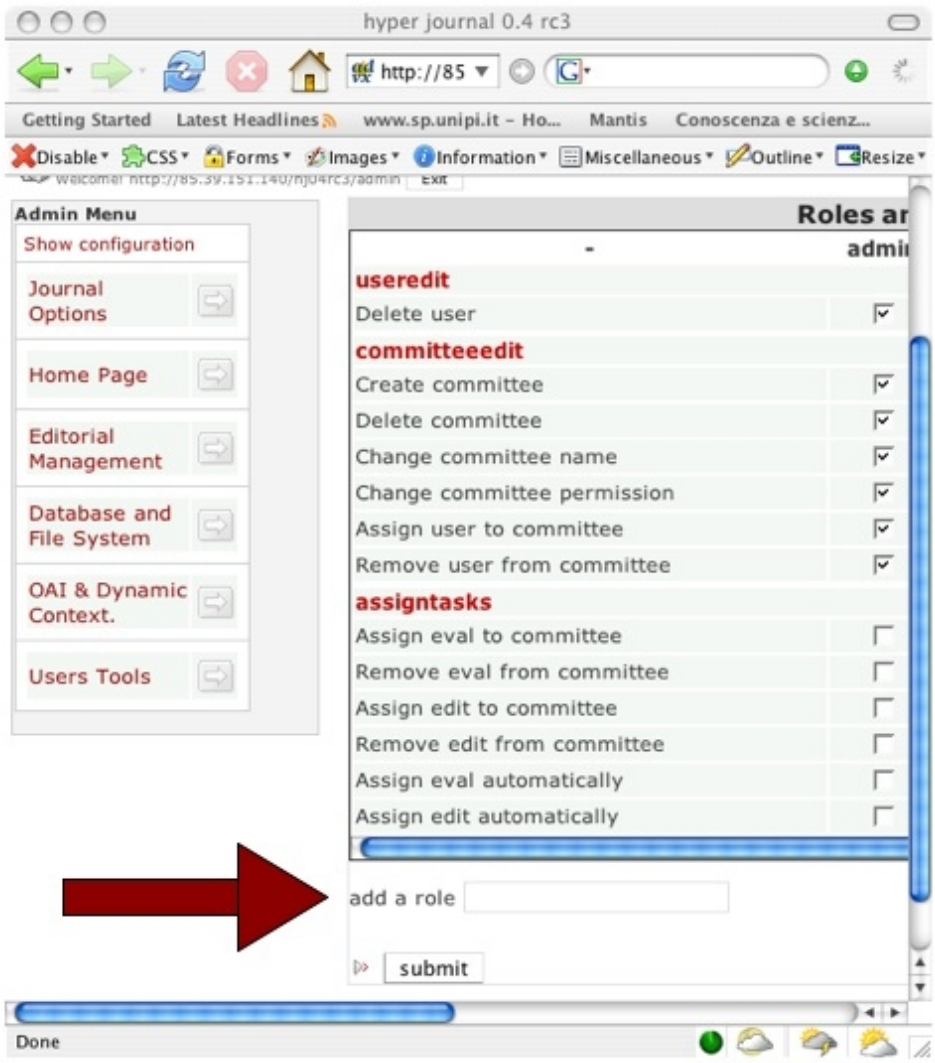

Illustration 15: Creating a new role.

Publication criteria and Peer review settings

The publication criteria which can be modified are shown in the following figure.

In particular, fast evaluation defines the number of days required for the manuscript to remain above the publication threshold before being automatically approved. [This feature is disabled in version 0.4].

Publication threshold is the number of votes necessary to approve a contribution. This number is computed for each submitted manuscript as the algebraic sum of votes (where a positive vote counts +1 and a negative one counts -1). For example, in the following figure, a contribution needs 2 positive votes, or 3 positive votes and a negative one in order to be approved.

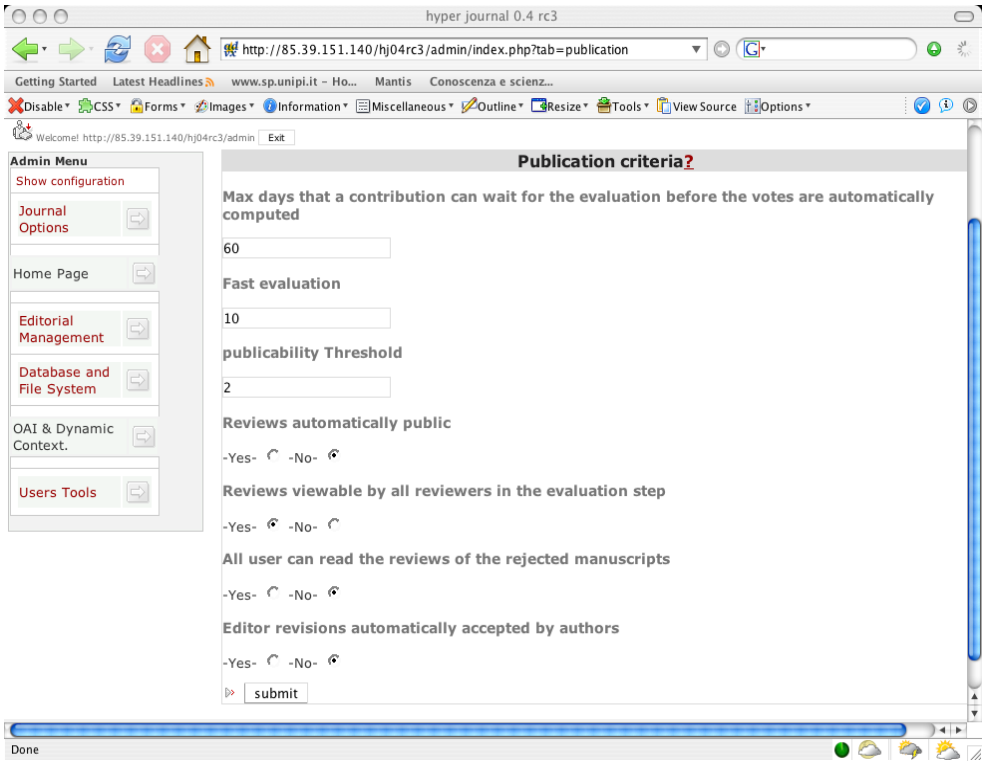

Illustration 16: The Publication Criteria control panel.

Contribution file types

Here it is possible to choose which of the following file types are accepted for manuscript submission in your Journal: HTML, PDF, RTF, (PNG, JPEG, GIF), PS, LaTeX, XML-DocBook, Text.

Enable licenses for this journal

You can choose which licenses are allowed for your Journal from a predefined list of licenses, or add a new one, as shown in the following figure. The selected licenses will be shown to the user during submission of the manuscripts.

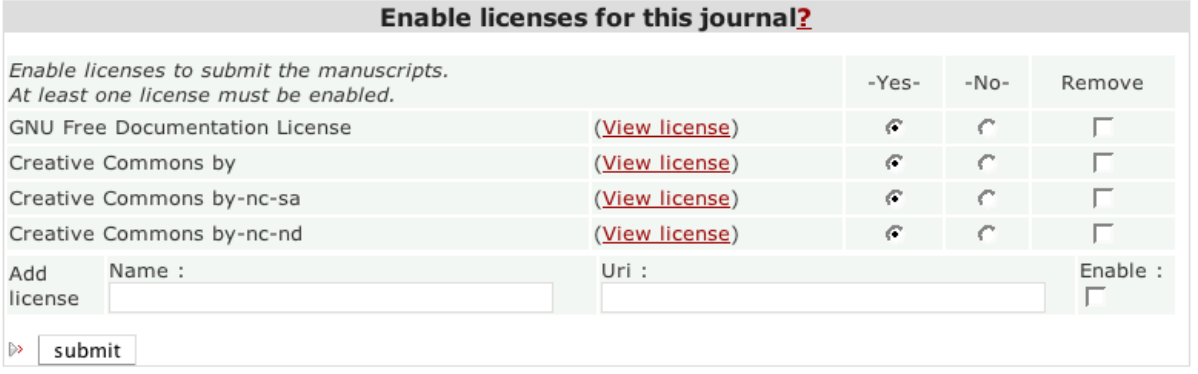

Illustration 17: Configuring licenses.

You can add one or more licenses to the list, or remove or deselect a preexisting one.

Enable languages

You are asked to enable the languages allowed for manuscript submissions. At least one language must be enabled. The list of accepted languages will be shown to the user during the submission of a manuscript.

Edit Subjects

Here you can create one or more subjects in your Journal. You can use subjects to categorize contributions or to create sections in your Journal.

At least one subject must be created before submission of manuscripts is permitted. The tree of subjects will be shown to the user during manuscript submission and to the journal editor during the publishing phase.

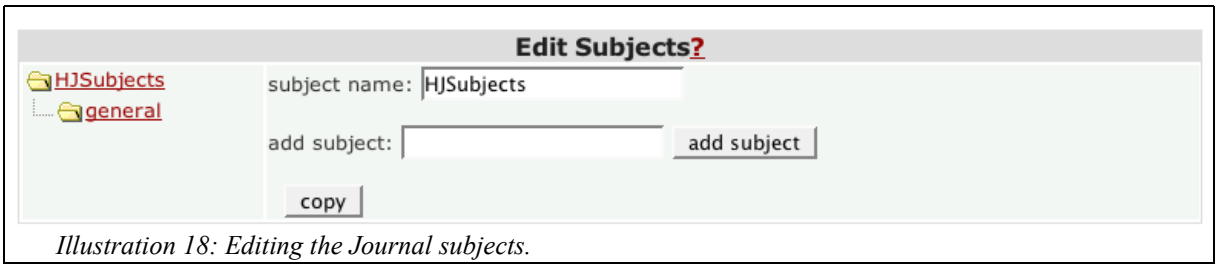

Illustration 18: Editing the Journal subjects.

Home page

The following functions are included in the Home page Menu:

- Views,
- Lateral boxes in the home page,
- Articles displayed in the home page,
- Static pages,
- Custom menu.

Views

You can decide whether to show the latest published items and, if so, the number of items to show.

Lateral boxes in the home page

You can add side boxes in the home page. To add a new box click on the “Add a box” button, as in the following figure:

Illustration 19: Managing boxes.

In the following step, you can enter the new box text (in HTML format), choose its location (left or right) and position. The position of a box is a sort of “weight”, boxes with a “lighter weight” are shown on top of “heavier” boxes.

Caution Depending on the chosen graphical theme boxes may not fully work. E.g. Some themes do not have boxes on both sides but only on one side, in such cases the position setting will be ignored.

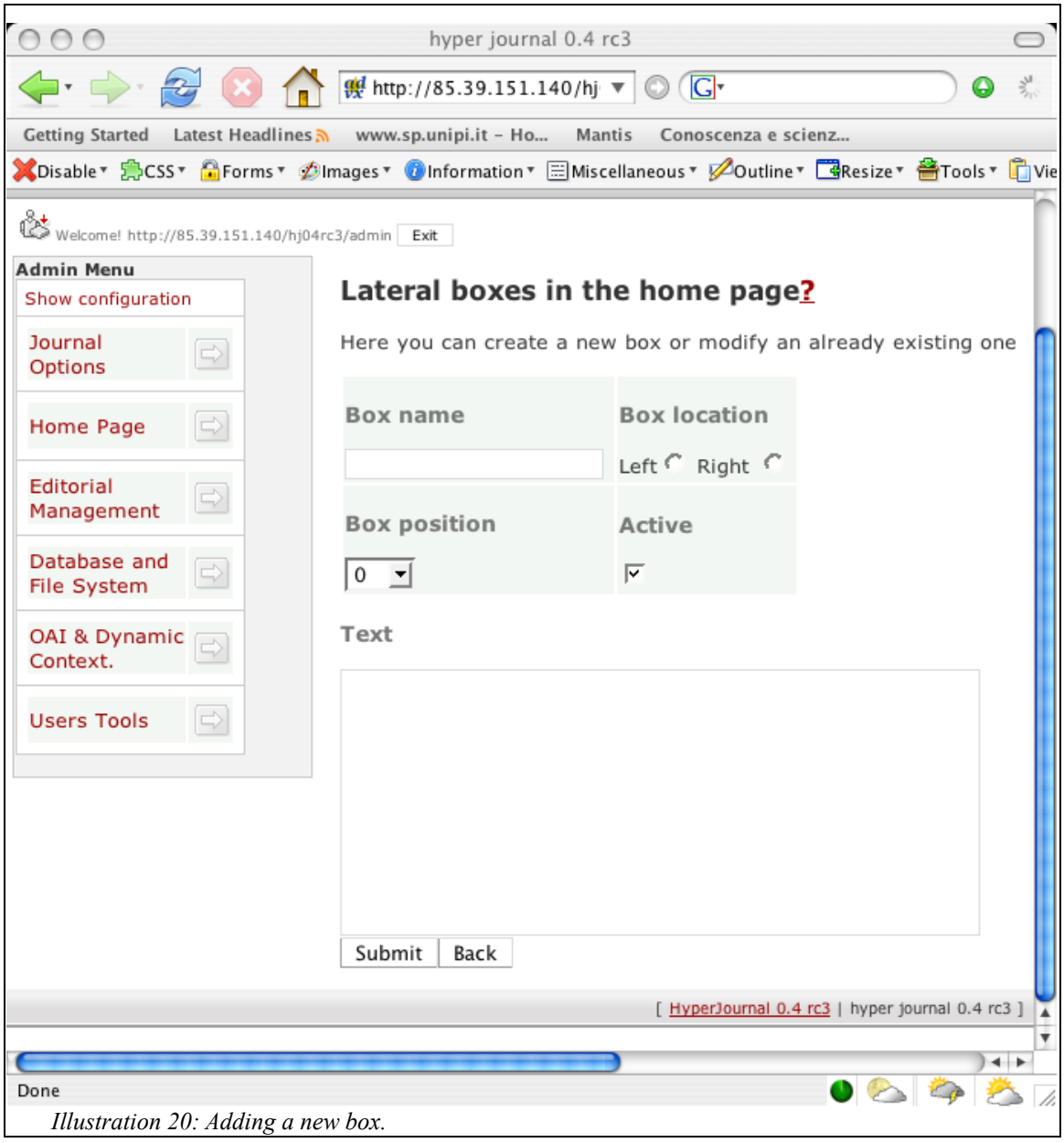

Illustration 20: Adding a new box.

Articles displayed in the home page

This panel allows you to define “teasers” (short summaries) of articles to be shown in the home page of your journal. Such boxes are sticky, which means that they will always be shown in the home page (they will not be replaced even if a new article is published). While adding a new article box, its default text is the abstract of the article

as approved by the editor. However, you are not obliged to use the abstract as an “article teaser”, you can change the text (changing the text here will affect the teaser only, it will not affect the original article abstract).

Illustration 21: Managing article boxes.

Static pages

Journal managers can create static pages which are linked from the home page. Once created, static pages can be modified or deleted. Static pages normally contain general information about the Journal such as Journal staff, submission policy, copyright policy, ISSN number, etc.

To create a page, click on New button.

Illustration 22: Creating a new static page.

In the next step, you are asked to fill in the following information:

- name of the page (which will appear as a title of the page),

- position of the page (choose it by clicking on the left tree),

- page content. HTML code is here allowed here.

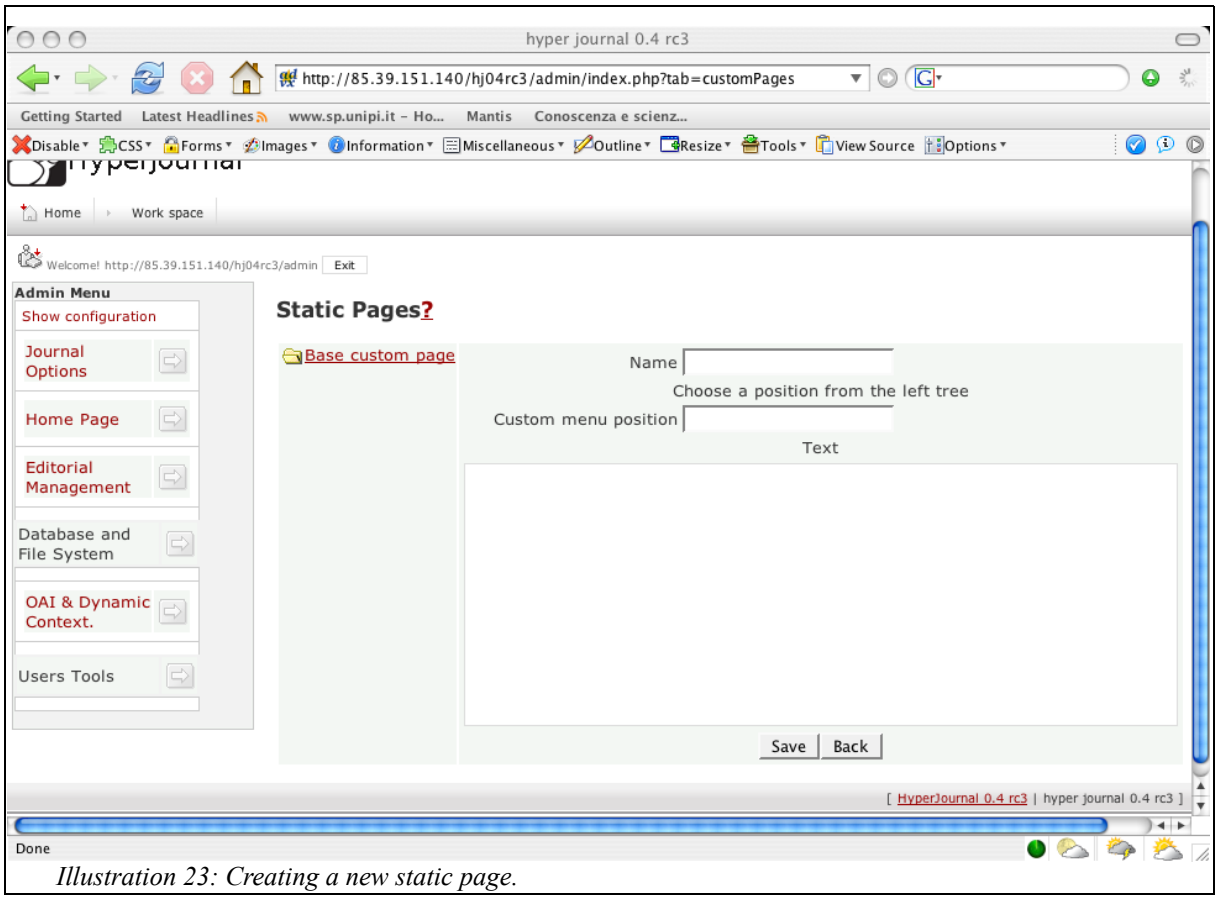

Illustration 23: Creating a new static page.

Custom menu

Furthermore, it is possible to modify the tree of the static pages, as shown in the next figure.

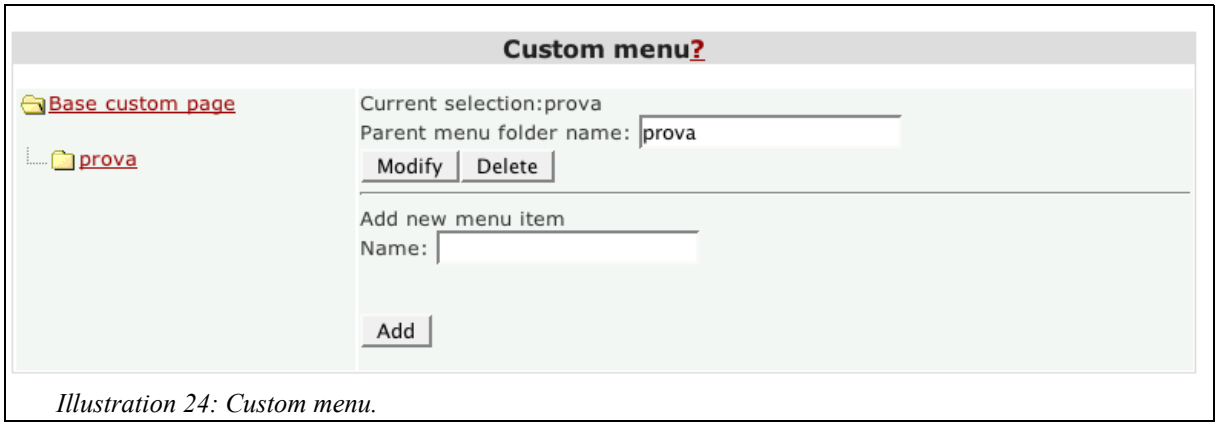

Illustration 24: Custom menu.

Users management

In the Workspace main page the following User management tools are available:

- Edit Users,
- Invite users to roles.

Illustration 25: The workspace menu.

Edit Users

In this panel all registered users of the Journal and their roles are listed.

Invite users to take on roles

To assign a particular set of permissions to users, you must invite them to take on roles. Select users by clicking in the empty boxes following the names on the right, and then select the role to invite them into. Finally, click on the Invite button.

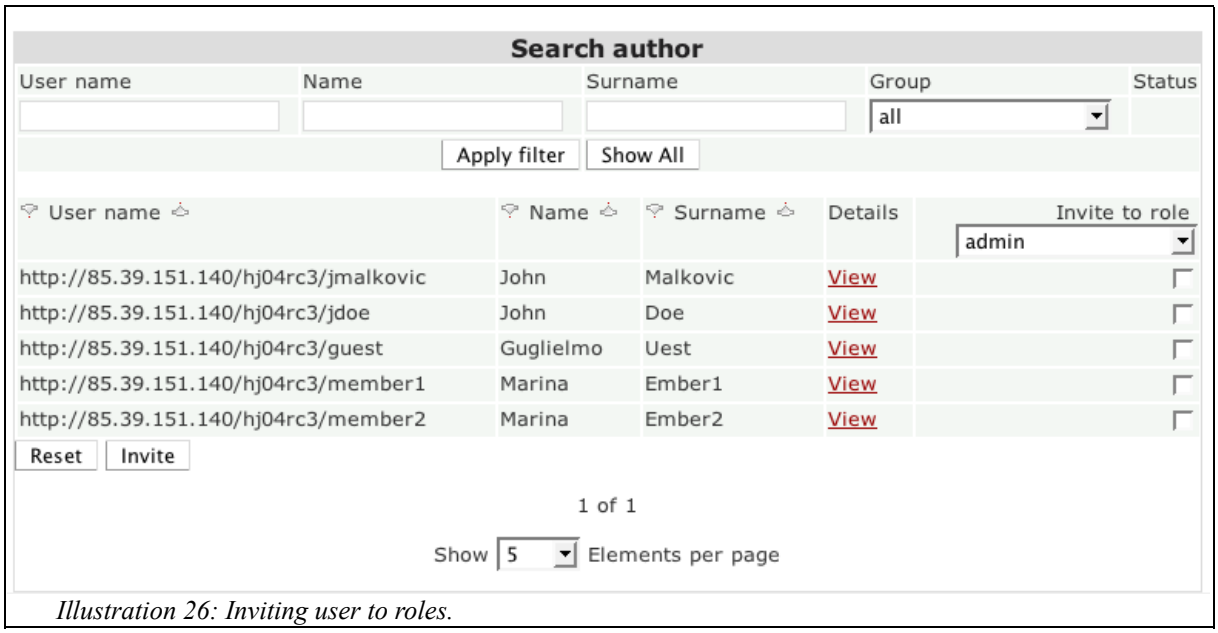

Illustration 26: Inviting user to roles.

To be activated, invitation must be accepted by the users from their workspace. See the “HyperJournal for Authors” section to find out how this should be accomplished.

HyperJournal for Reviewers

Getting Started

Reviewers usually perform peer review related tasks.

Peer review

The Peer Review menu has the following entries:

- Review manuscripts,

- Compute votes,

- Skip evaluation.

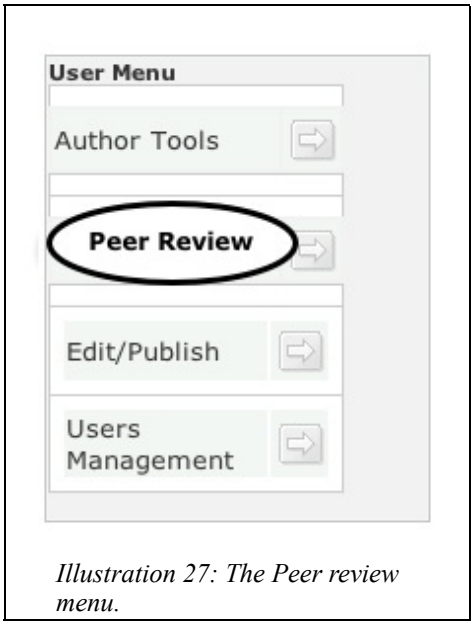

Illustration 27: The Peer review menu.

Review manuscripts

By clicking on the Review manuscript option, you access the list of manuscripts waiting to be peer reviewed.

You can read and download the manuscript and express your vote (yes or no), as shown in the following figure.

Confirm your vote by clicking Ok in the next window.

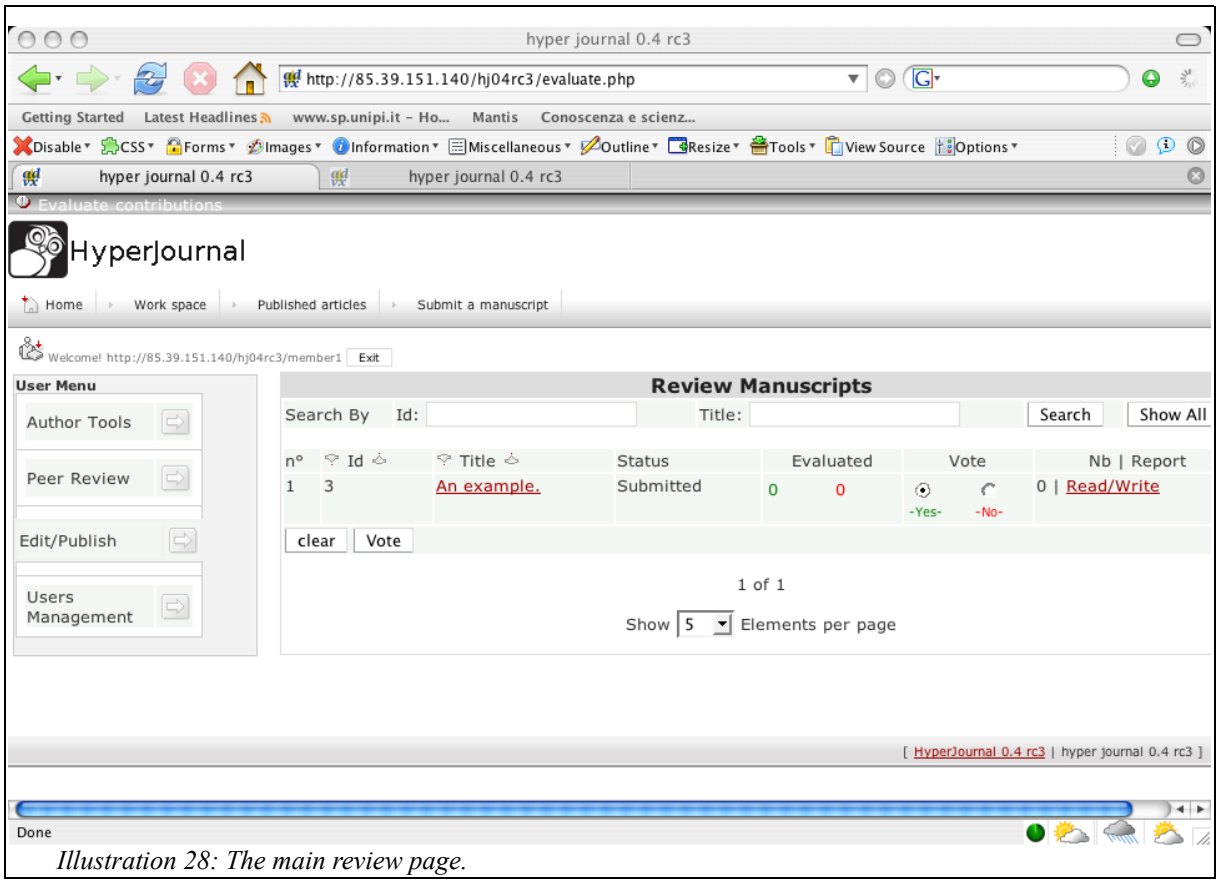

Illustration 28: The main review page.

It is also possible (if the Journal Manager has enabled this option) to read the reports of other reviewers and to write your report, which can be public or private.

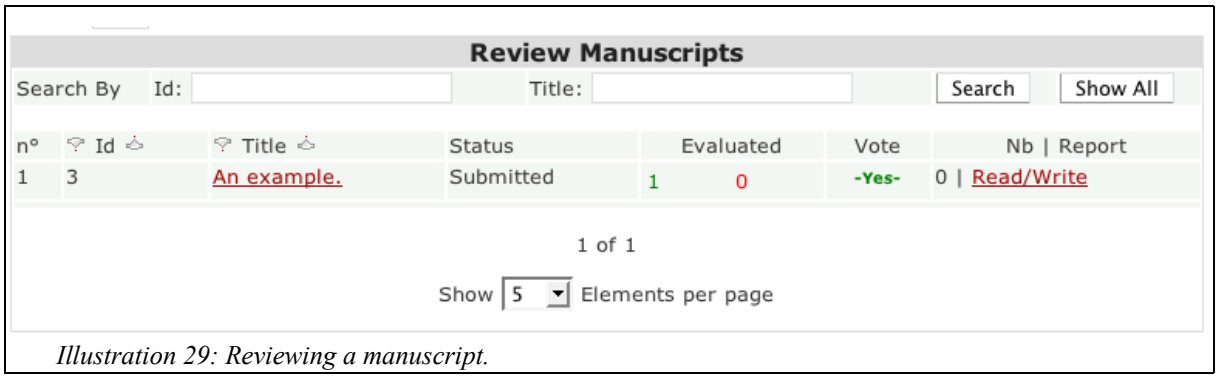

Illustration 29: Reviewing a manuscript.

By clicking on the “Read/Write” link, you enter a new page in which you can write and modify your report. You can also choose to make the report public or not. When you finish, click on the Send review button.

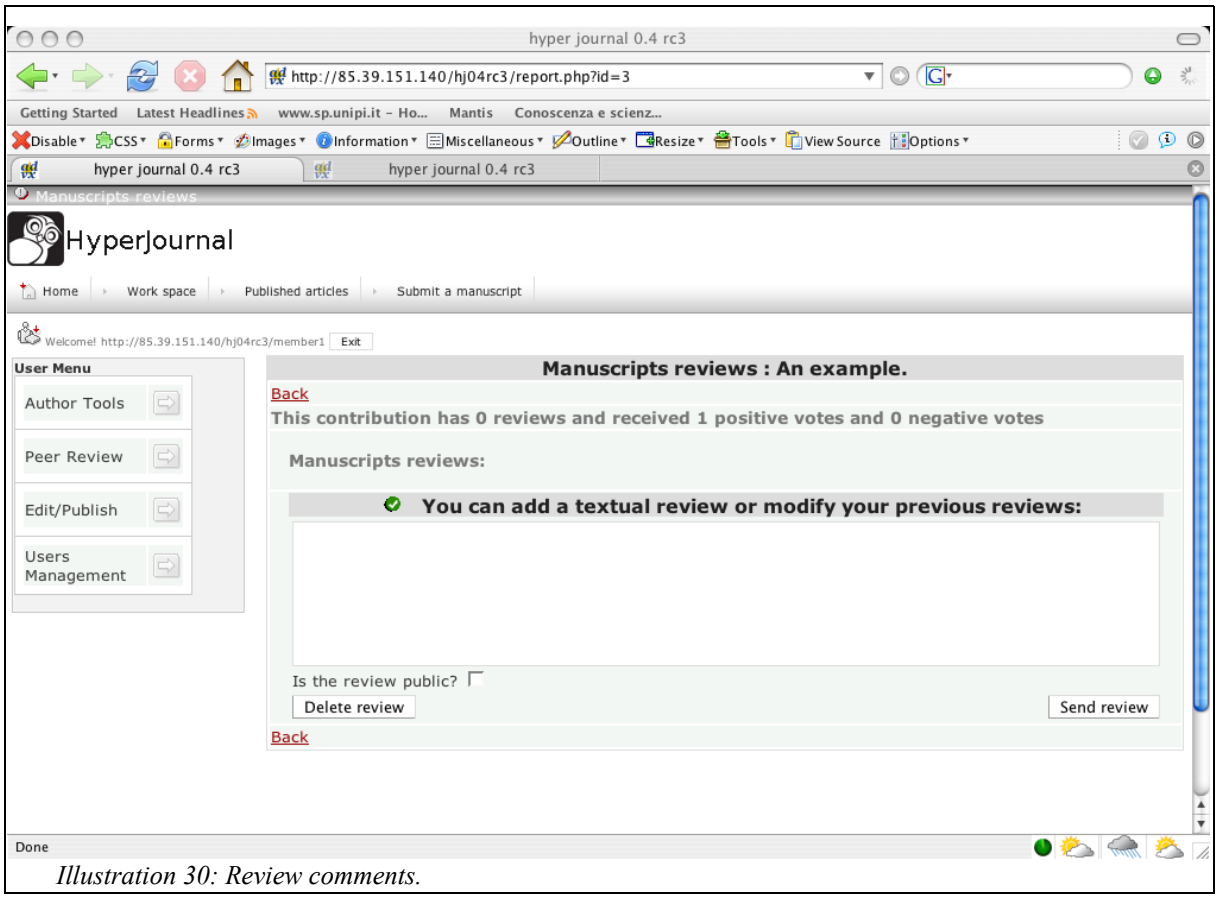

Illustration 30: Review comments.

Compute votes

With this function you can compute the votes received so far by a manuscript. By selecting a manuscript and pressing the Submit button, the manuscript votes are computed. If the sum of votes received by the manuscript is higher than the publication threshold (see the "Publication criteria and Peer review settings" section), then the manuscript is approved and transferred to the editorial phase, otherwise the manuscript is refused and goes to the refused manuscript list.

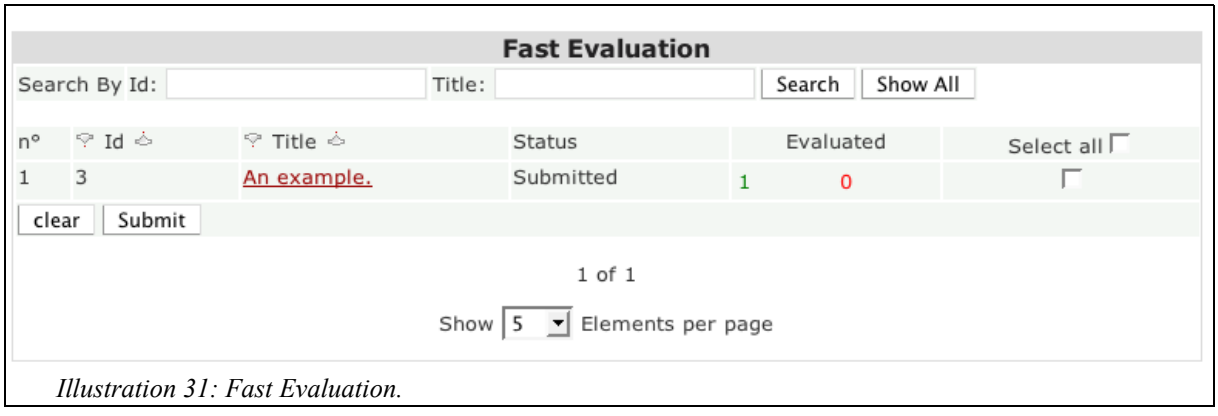

Illustration 31: Fast Evaluation.

Notice Fast evaluation is not a way to skip peer review. In the above example, by selecting "An example" the contribution is approved only if its publication threshold is 1 (because the manuscript has a positive and no negative votes). E.g. if the publication threshold were 2, the manuscript would be refused. Please be extremely cautious before computing votes as there is no way to retrieve a manuscript back from the refused list. [In

a future version there will be a mechanism to automatically compute votes when a specific condition is met (e.g. a certain number of days has passed since submission, the manuscript has received votes from a fixed number of reviewers, etc.)].

Skip evaluation

Use this option to skip the peer review process. Skip evaluation permits direct approval of a manuscript.

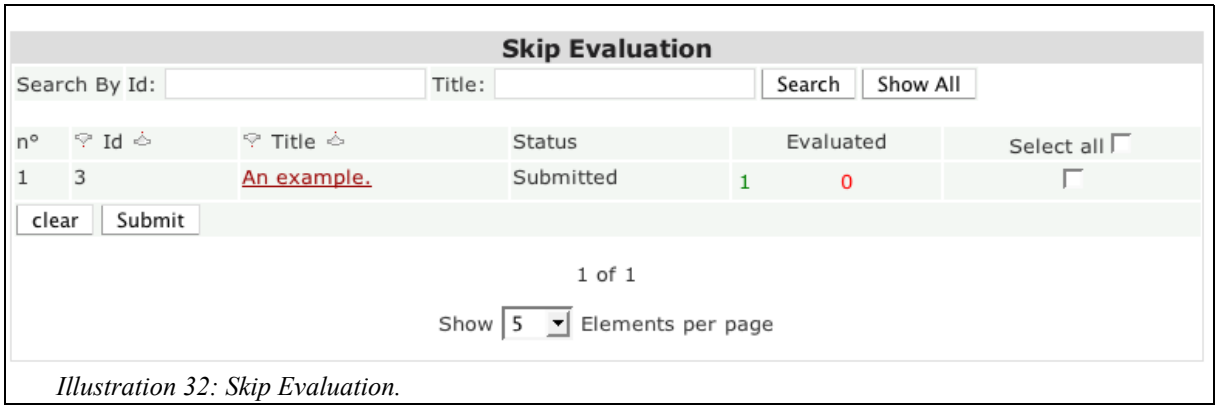

Illustration 32: Skip Evaluation.

HyperJournal for Editors

Getting Started

Users that belong to the “editors” pre-defined role perform the editing and publish articles. Their tools are grouped in the “Edit/Publish” menu entry.

Editing and Publishing

The Editors can perform the following tasks:

- Assign items to subjects,

- Lock manuscripts,

- Edit.

Illustration 33: The Edit/Publish sub-menu.

Assign items to subjects

This panel has been devised to assign a manuscript to one or more subjects. Please remember that each manuscript can belong to more than one subject. Before assigning subjects to manuscripts, the subjects tree needs to be defined (see the “HyperJournal for Journal Managers“ section).

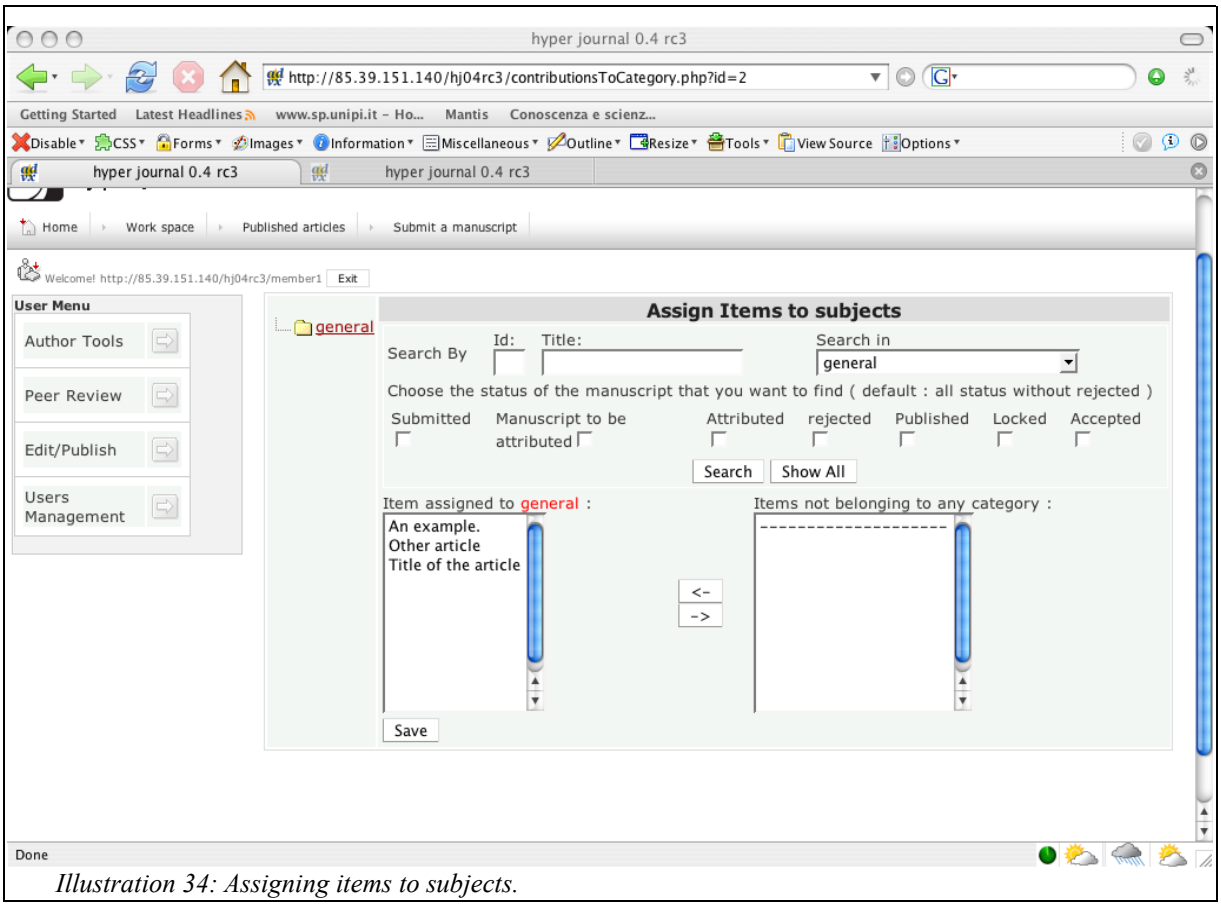

Illustration 34: Assigning items to subjects.

Lock manuscripts

In order to avoid conflicts, the editing phase must be performed by one single editor at a time. For this reason you must “lock” a manuscript before entering its editing phase. Locking an item prevents other people from editing it. In order to lock a manuscript check its “Lock” check box and click on the Lock button.

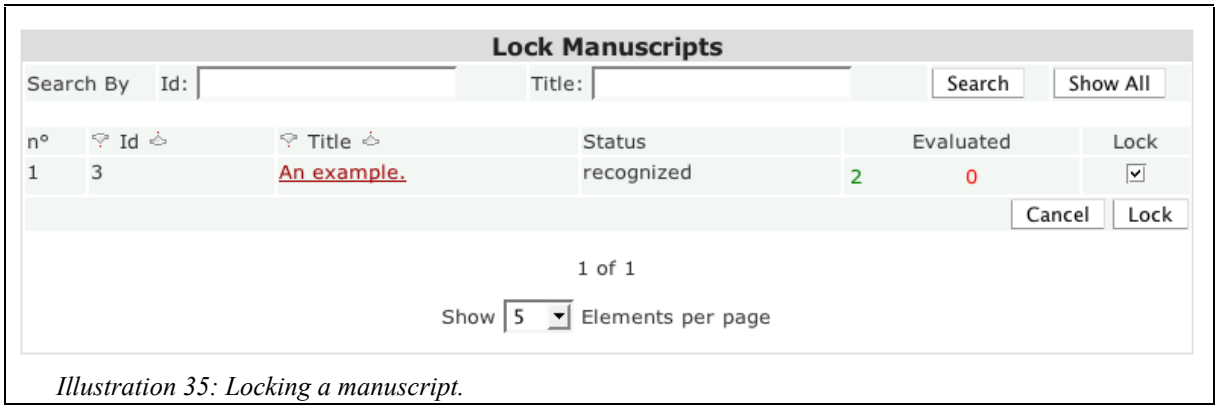

Illustration 35: Locking a manuscript.

Confirm the operation to lock the manuscript.

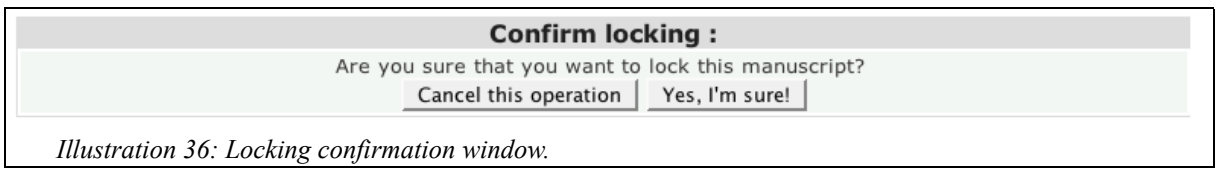

Illustration 36: Locking confirmation window.

Please remember that you can unlock a previously locked manuscript at any time

before publication.

Edit

In the Edit panel there is a list of manuscripts locked by you. These are the manuscripts on which you can perform the editing. You can also unlock manuscripts from here. Click on the Edit button to start the editing phase of a manuscript.

Check the unlock check box of all the manuscripts you wish to unlock, then click on the Unlock button to unlock the selected manuscripts.

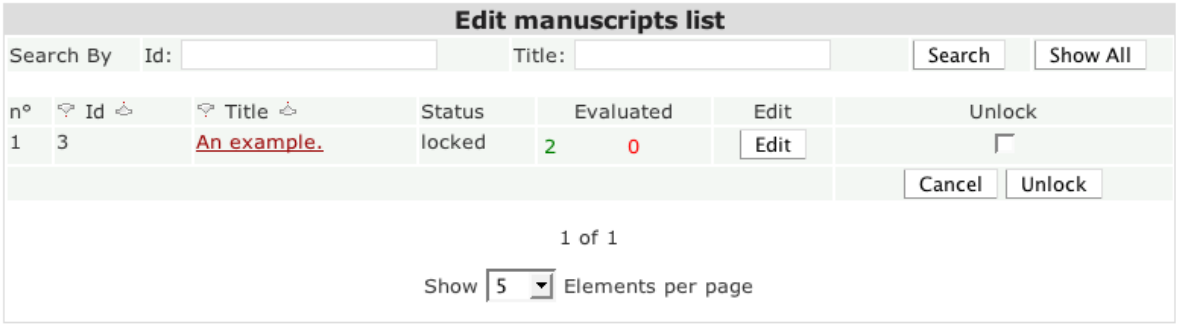

Illustration 37: Selecting a manuscript to edit.

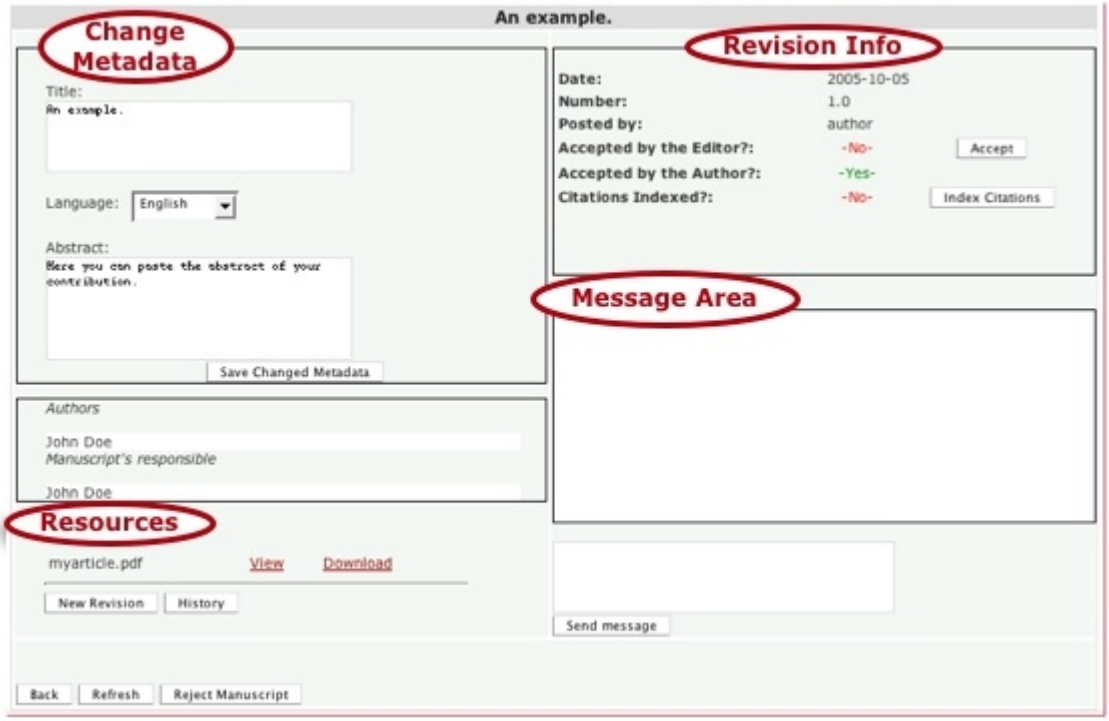

Illustration 38: The main editing window.

The Main Editing Window

The main editing page is split into 4 different areas:

- Change metadata,

- Resources,

- Revision Info,

- Message Area.

Change metadata

Here you can modify manuscript metadata. Click on Save changed Metadata to save changes.

Resources

The resources area is the most important one. It lists the physical resources (files) that are part of the manuscript. Here you can perform the following actions:

- Create a new revision.
- View the revision history.
- Download and view each individual resource.

Revision Info

The revision info panel contains the following information:

- Date: Creation date of the current revision,

- Number: Current revision number,

- Posted By: Creator of the revision (author or editor),

- Accepted by the Editor: Whether the editor has approved this revision or not,

- Accepted by the Author: Whether the author has approved this revision or not,

- Citation Indexed?: Whether the citations in this revision have been indexed or not.

Message Area

The message area is an asynchronous messaging system where the manuscript submitter and the editor can exchange messages about the editing. Each message is marked by its author and the revision number it refers to. In order to leave a message to the editor (submitter) just type it in the check box and press the Send Message button. The editor (submitter) will then see the message while viewing this page.

How the editing works

Revisions and Resources

The editing phase groups together several typical tasks of a publishing process (editing, copyediting, layout editing, etc.). It is during the editing phase that a “manuscript” becomes a “contribution” (also known as “article”).

The resources are the actual manifestations of a manuscript, the files that form the manuscript (e.g. Its full-text, style sheets, figures, datasets, videos, audio or whatever is part of it). The first time you access the page as an editor you will see the files sent by the manuscript submitter listed there. As the editing process goes on, you will make corrections and changes to the original manuscript, eventually change the file formats (probably to HTML or PDF) by substituting or adding new resources. Whenever you substitute or add a new resource, you will create a new revision. A revision has its own resources (files) and metadata. It also has its own citation indexing, which we will explain hereafter.

File formats and resources

Please note that when you finally approve a revision for publication, thus concluding the editing phase, the revision resources are the files that will be published. So, it is during this phase that you must make sure that the graphic layout of the main file (usually HTML or PDF) is correct and, if it points to other resources (style sheets, pictures, etc), that the links in the main HTML file are correct (they must be relative links). As a best practice we strongly advise the use of XML as an intermediary format for the production of both PDF and HTML. The usage of XML for such a task is, however, outside the scope of this manual; you can ask for more information on the HyperJournal mailing-lists.

Revision history and approval

The “History” button in the resource area allows you to view the complete manuscript revision history. The history shows for each revision the newly added resources and for each substituted resource a comment describing the changes made to that file. You can also revert to previous revisions.

According to your journal settings, each revision has to be approved by both the submitter and the editor or by the editor only. You must approve the revision in order to be able to conclude the editing phase. Before approving a revision you may want to

“index citations” if your journal makes use of the Dynamic Contextualization feature.

Citation indexing and Dynamic Contextualization

The Dynamic Contextualization is an advanced feature that enriches the user's experience and automates the process of bibliometric statistics computation.

When the Contextualization is enabled the users will not only be able to see a link to the articles cited but also a link to the articles CITING the one currently being read. For the Contextualization to work, you must signal the citation contained in a manuscript to the system. This can be done by following a standard procedure which will be explained hereafter. It is important to note that if your journal is part of a Contextualization Federation, then Contextualization will work amongst all the journals that are members of the Federation, thus increasing its usefulness.

Tagging a citation

To signal the existence of a citation, you must tag the manuscripts. The procedure is different if the article being tagged is an HTML or PDF file.

Case 1: HTML

To highlight a citation you must insert the following tag in the main HTML file:

<context siglum=”target_siglum”>citation text</context>

Please note that:

- “target siglum” must be a valid siglum, it can point to an internal as well as to an external contribution (a bibliographic entry known to the system).
- “citation text” must be on a single line of the original HTML source file.
- The whole context tag (from “<context” to “/context>”)must be contained in a single line in the HTML source file. Do not split over in multiple lines

Once you have uploaded a revision of the main HTML file with the tagged citations, click on Index Citations button to start the indexing procedure.

During the indexing procedure the system will scan the article for tagged citations and try to resolve them. At the end it will show you a summary of the citations found. Please note that this is your last possibility to correct a wrong citation.

An example

Suppose you want to cite an article by John Doe which is published in the “Journal of Alien Mathematics” and the article URI is www.amjournal.org/34; so insert the following tag in your article:

As <context siglum=”www.amjournal.org/34”>John Doe says in his article </context> the theorem proof is trivial...

By following this procedure the system will add a link to the pointed article around “citation_text” and in the Contextualization Bar. Moreover the system will add a link to the citing article in the Contextualization Bar of the cited article.

Case 2: PDF (or PS, or image file)

The only difference with respect to the HTML case is that you do not have to “tag” the citations in the source file, instead you will be asked to enter the siglum of the citation targets into text boxes. Please note that in this case the citations to and from the article will be shown to the reader in the Contextualization Bar only.

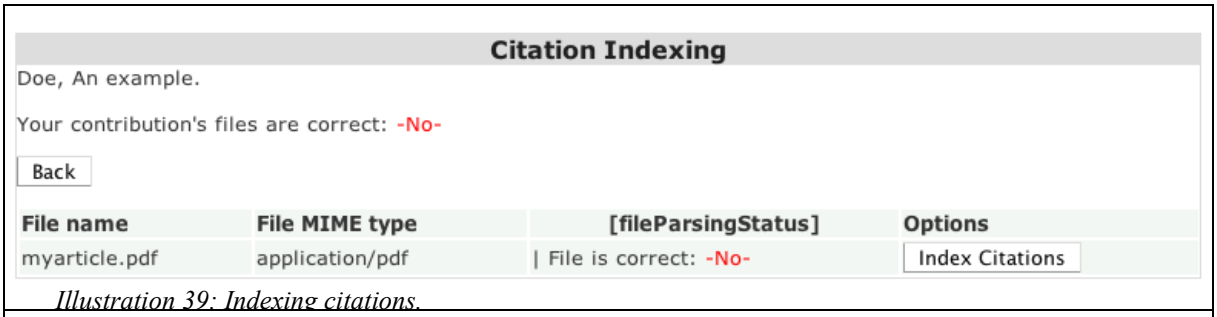

Illustration 39: Indexing citations.

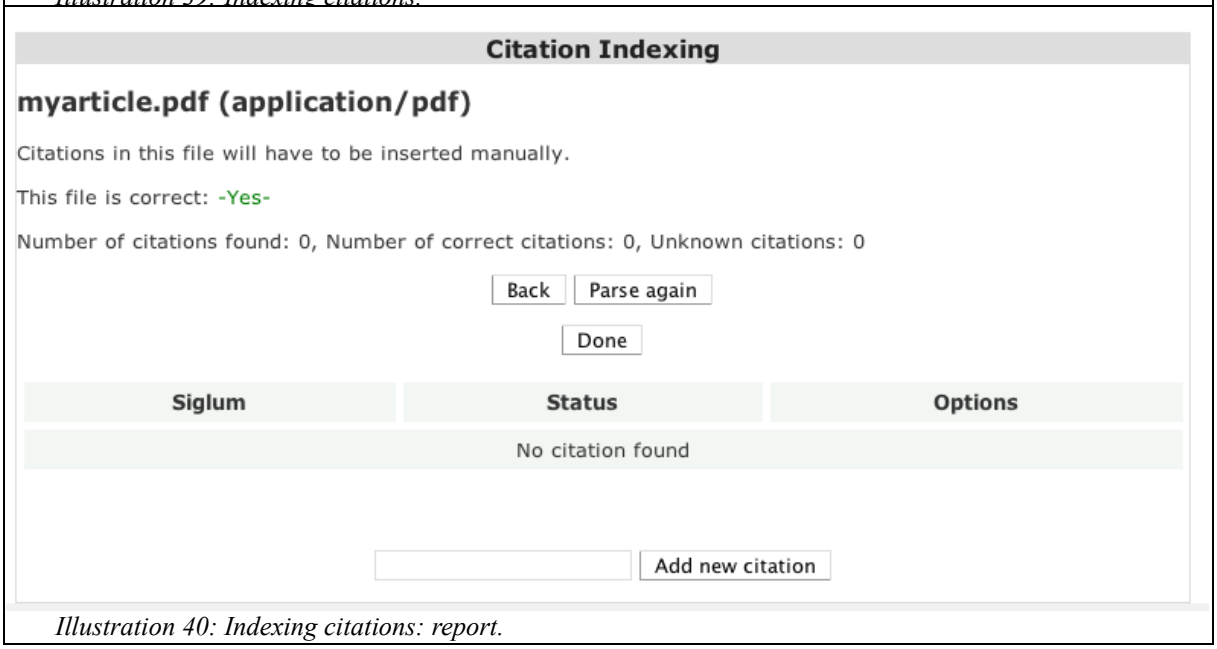

Illustration 40: Indexing citations: report.

Once you are satisfied with the revision, and it has been approved by both the author and the editor and you have performed the citation indexing, press the Publish button to finish the editing phase and publish the article.

Warning It is impossible to delete a previously published article. Be very careful when you press the Publish button!

If, for any reason, you want to quit the editing phase and trash the article, you can press the Reject Manuscript button. Please be aware that there is no way to recover an article once it has been rejected during the editing phase.

HyperJournal for Authors

Getting Started

The authors' most important instrument is Manuscript Submission. In order to submit a manuscript, you do not need to be logged-in because manuscript submission and evaluation are anonymous. However, if the manuscript passes the peer-review stage, you will be asked to attribute the authorship of the anonymous manuscript. To demonstrate that you are the real submitter of the original manuscript, the system will ask you to choose a password when you submit the manuscript and to enter the same password to attribute manuscript authorship.

Besides the submission tools, if you log in to the journal as a registered author, you will be able to use the so-called “author tools”. We will first describe the submission procedure in detail, and then we will illustrate the author tools.

Submitting Manuscripts

Click on “Submit an article” to start the manuscript submission procedure. In order to submit a manuscript to the journal, you need not to necessarily be one of its authors, but need to have obtained authorization from the authors to submit their manuscript. To reflect the fact that you may not be the manuscript author we will address you as the manuscript submitter from now on in this guide. The manuscript submission procedure is made up of several steps (“panels” from now on); the title of the panel where you are is always highlighted, while the others are gray (or somewhat grayed out and disabled).

The Start Panel

In the first panel, you must specify whether your manuscript is an original or a derivative work. Do not modify the default choice if your manuscript is an original work. If it is a derivative one, such as an edition or a translation, please select “yes”. If your manuscript is a derivative work you will be asked to provide some information about the original work in addition to the information about your own derivative work.

Click Next to proceed to the metadata panel.

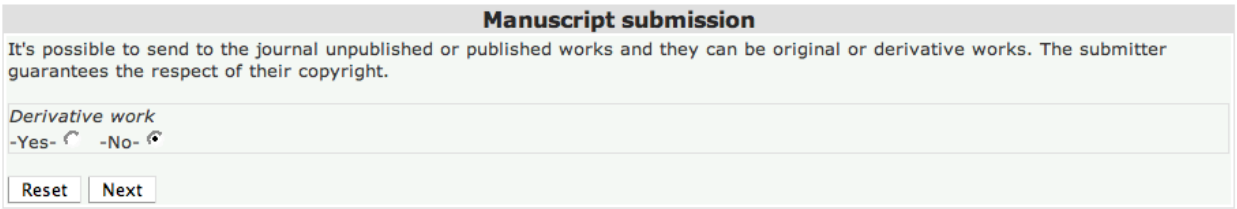

Illustration 41: Manuscript Submission: first panel.

Metadata Panel

In the metadata panel you must enter some information such as title, language and abstract of your work. Please note that you are not asked to enter the manuscript authors as the submission procedure is anonymous. Please also note that the data you enter here can be modified by the journal editor during the editing phase.

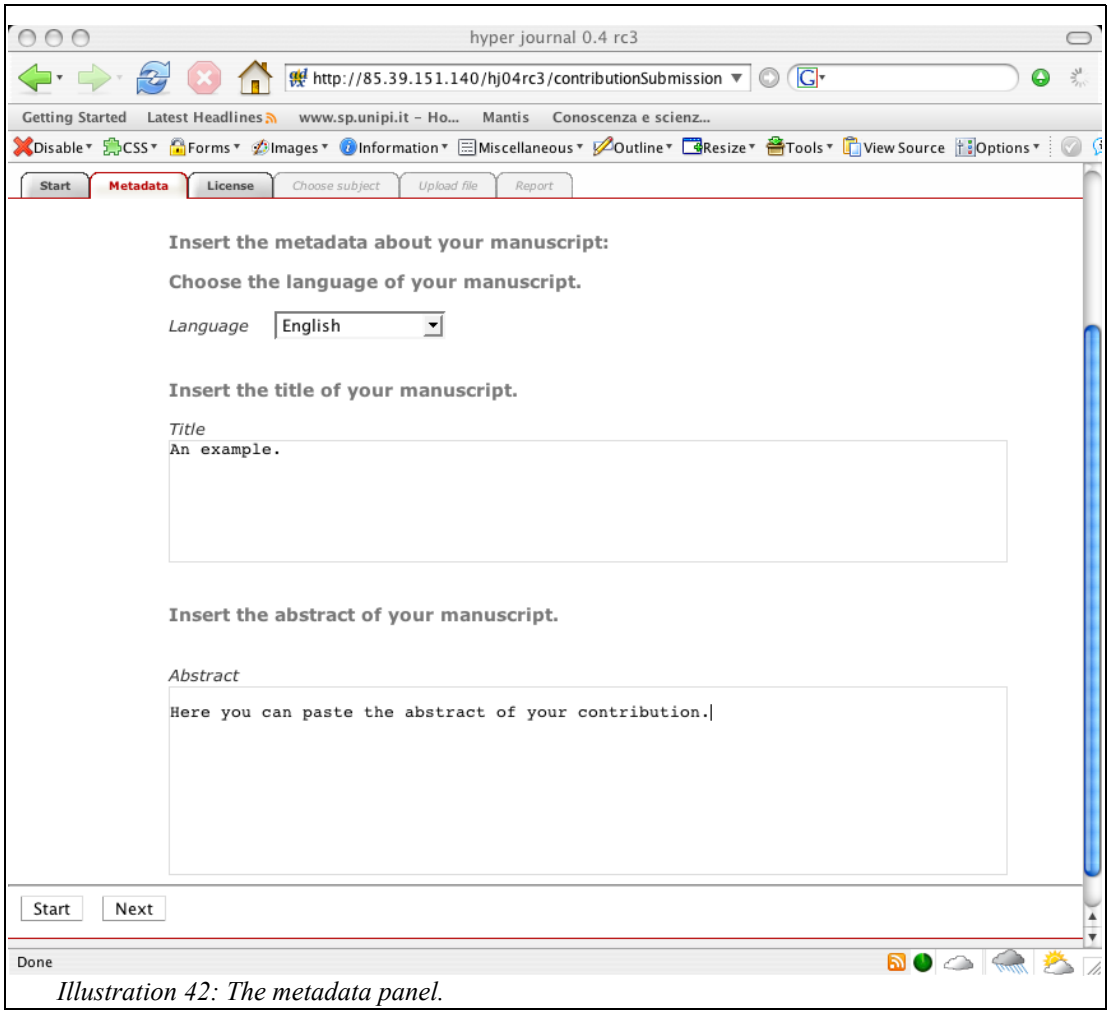

Illustration 42: The metadata panel.

Click Next to proceed to the next panel.

Authors (original work) [This panel is only shown for derivative works]

In this panel you must enter some information about the authors of the original work. In order to correctly attribute the authorship of the original work you must search for its authors in the list. To search for an author:

1. click on surname initial,
2. scroll the list and select the author,
3. click on the -> button to move the author's name to the list of selected authors.

Repeat this operation until all the original manuscript authors appear in the selected authors list.

WARNING If, and only if, you cannot find one or more of the manuscript authors in the list, you can click the "Add a new author" button. Clicking on "Add a new author" will open a pop-up window where you are asked to enter the author name and surname.

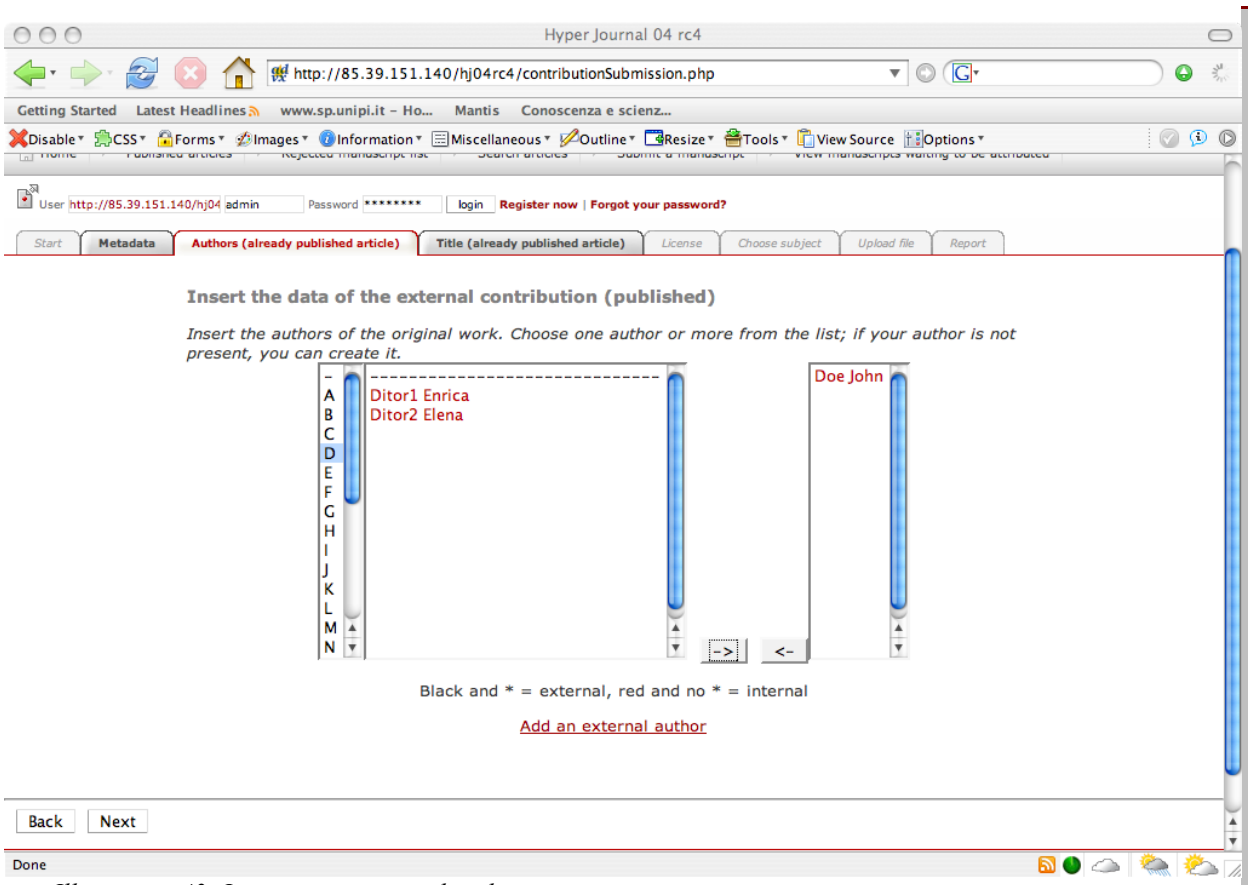

Illustration 43: Inserting an external author.

WARNING Please double check that the author you are going to enter is not already present in the list before confirming the insertion of a new author. Entering a duplicate or misspelled author name may cause malfunctioning of the entire journal. Misuse of this feature can cause your computer to be blocked from accessing this journal any more.

Title (original work) [This panel is only shown for derivative works]

In this panel you must enter some information about the bibliographical entry that represents the original work. In order to correctly identify the bibliographical entry of the original work you must select its title from the list. The system will show a list of all the works he knows whose author is the one you selected in the previous step. To select a bibliographical entry:

1. select it from the list and make sure it is highlighted
2. click on the Next button to proceed to the next panel

WARNING: if, and only if, you cannot find a bibliographical entry representing the original work you can add a new bibliographical entry (also known as “external contribution”). Click the “Add a new bibliographical entry” button to open a pop-up window where you are asked to enter some data about the original work.

WARNING: Please DOUBLE CHECK THAT THE WORK YOU ARE GOING TO INSERT IS NOT ALREADY PRESENT IN THE LIST before confirming insertion of a new bibliographical entry. Entering a duplicate or misspelled entry may

cause malfunctioning of the entire journal. Misuse of this feature can cause your computer to be blocked from accessing this journal any more.

Licenses panel

In this panel you can choose the license you want to use for your work among those accepted by the journal. If you want to read the license terms, click on View License. Please select the license carefully. HyperJournal encourages authors to use Open Content licenses (such as Creative Commons, FDL and other types of Open Content licenses) to publish their articles.

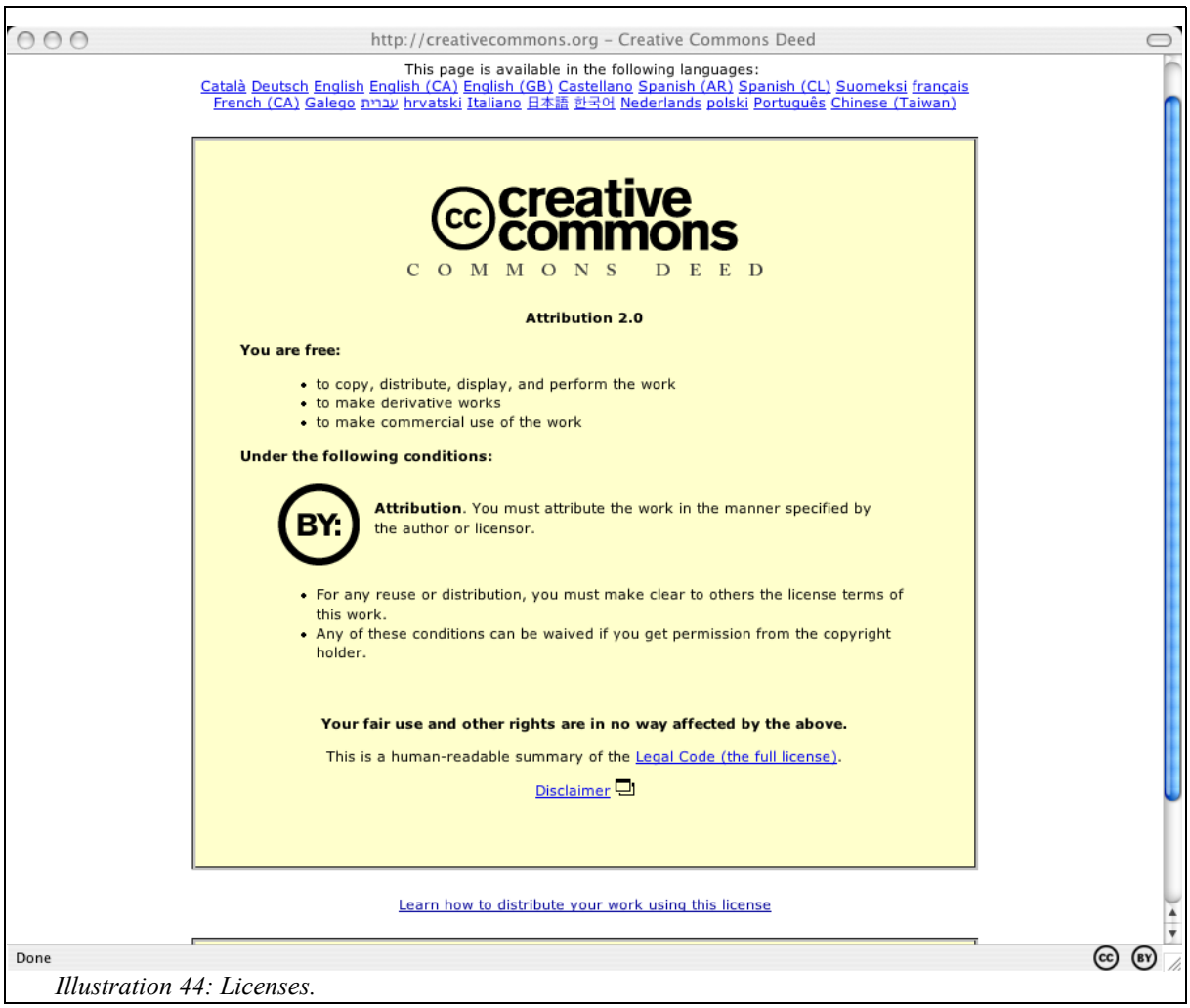

Illustration 44: Licenses.

The Subjects panel

In this panel you can suggest a subject for your manuscript. Please note that this choice serves as an indication only (e.g. to select appropriate reviewers for your manuscript) and can be changed by the journal editor.

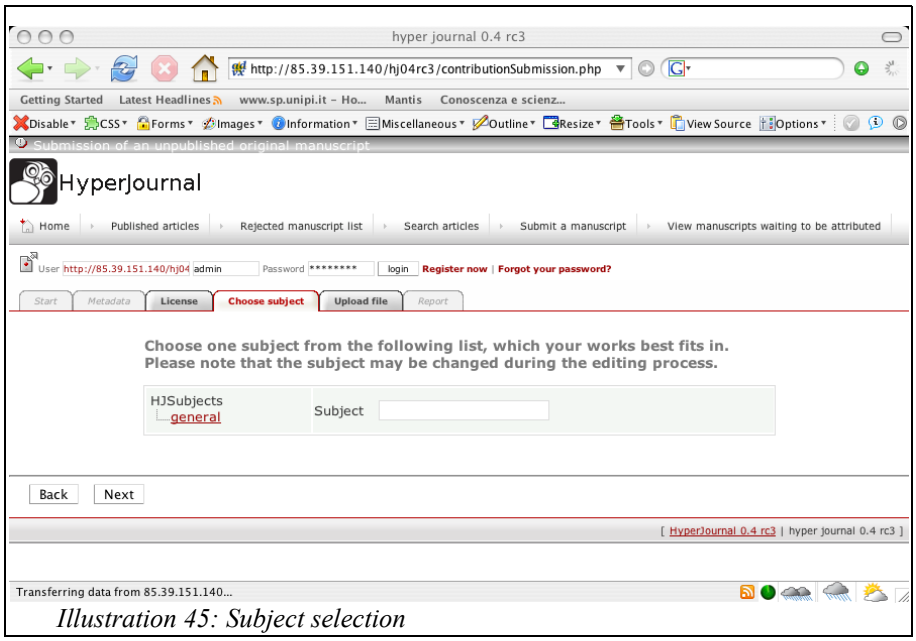

Illustration 45: Subject selection

To select a subject click on its name and make sure that the subject you choose appears in the text box.

Click on Next to proceed to the next panel.

The Upload panel

In this panel you must upload the actual files of your manuscript. Please note that there is no limit to the number of your manuscript files. You can for example add figures, datasets, animations and hypertexts, provided the uploaded file formats are permitted by the journal (ask the journal contact person or check the journal guidelines for authors to find out about accepted file formats of this journal). If your manuscript is made up of more than 6 different files, click on More Files, to get additional file upload input fields.

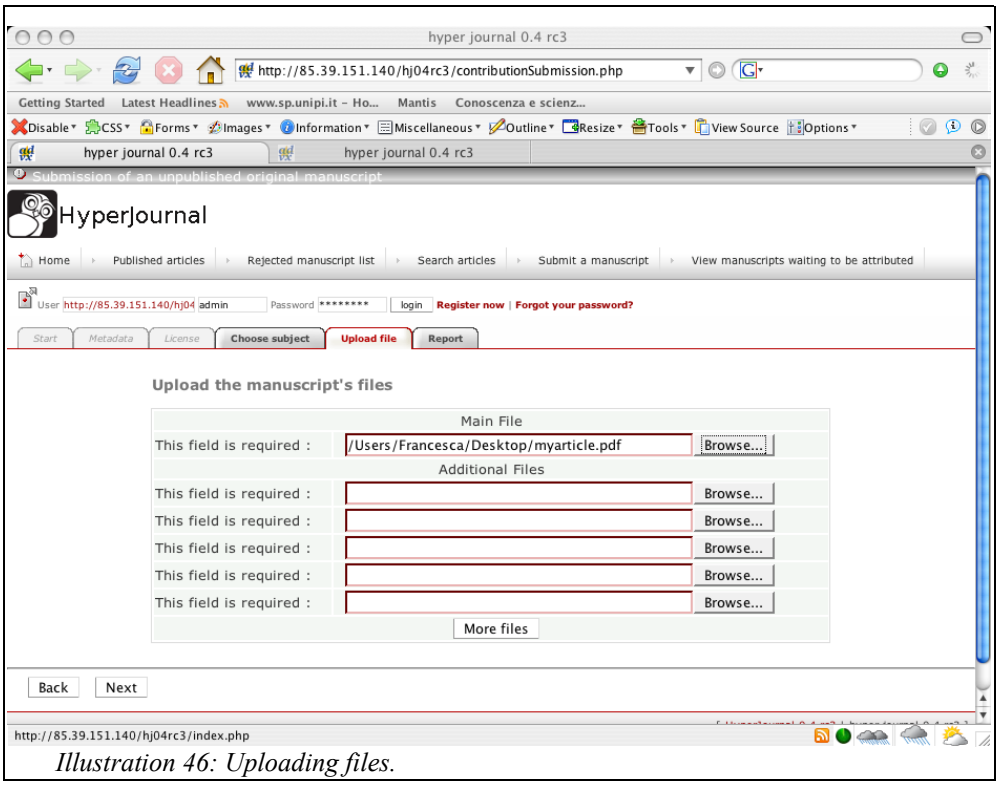

Illustration 46: Uploading files.

Click Next to proceed to the next panel.

The Report panel

This panel shows a report summarizing all the data entered so far. Please double check all is correct before clicking on End as this is your last opportunity to correct them before your manuscript is reviewed. If you make an error, click the Back button to go back to the panel where you made a mistake, and correct the data.

Choosing a password to identify the manuscript

Before ending the submission of your manuscript by clicking on the End button and submitting it to the journal reviewers, you must choose a password for your manuscript. Remember that submission is completely anonymous and this password is the only way to prove that this manuscript has been submitted by you. You will be asked to enter this password again if the manuscript passes peer-reviewing.

WARNING Please note that as submission is anonymous, the system does not know who you are, hence there is NO WAY of recovering this password. If you lose it, it will be impossible to attribute the authorship of the manuscript and the manuscript can not be published.

Finishing submission

After clicking on End, the system will show you the ID assigned to your manuscript. The ID will help you to find your manuscript in the accepted or refused manuscript list when the peer-review process is finished. Please keep it in a safe place together with the password. In agreement with the journal peer-review policies, your manuscript will be reviewed in a certain number of days. If your manuscript is accepted for publication, it will appear in the list of accepted manuscripts. Your manuscript will then be in a "pending attribution status". In order to notify the system of the manuscript authors and to begin the editing procedure you must select it from the list and re-enter the password you chose. To find out how to attribute (also referred as "recognizing" throughout this

manual) a manuscript, please read the “Recognizing Manuscript” section of this guide.

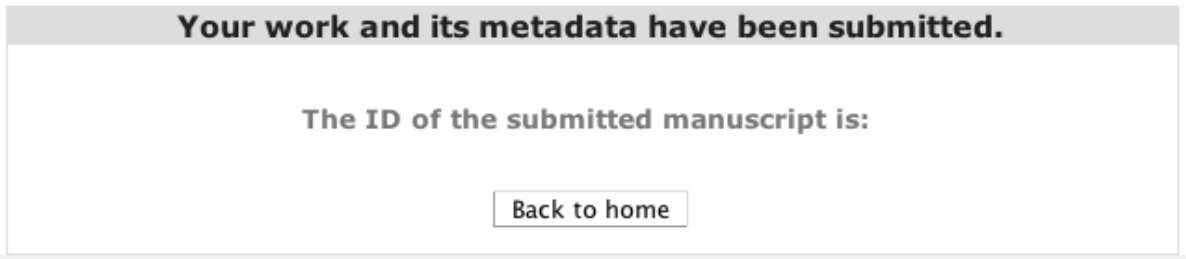

Illustration 47: Submission confirmation.

Author Tools

In order to be able to use the author tools, you must be logged into the journal. Only registered users can log-in. Please read the “Register to a HyperJournal” section to find out how to become a registered user.

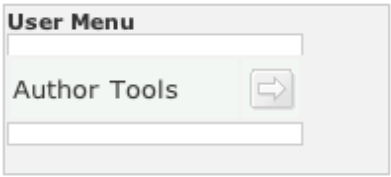

Illustration 48: The Workspace menu for authors.

The following author tools are available in HyperJournal v 0.4:

- Change password,
- Change your e-mail,
- View your Published Articles,
- Recognize approved Articles,
- Edit your in-editing-stage Articles,
- Manage your roles membership.

The usage of the first three tools is trivial and does not need any explanation; let us move to the other tools.

Recognizing approved Articles

To recognize (in the sense of “attributing the authorship”) a manuscript, you can click on the “Recognize approved Articles” link in the author tools menu or on “manuscripts to be recognized” in the body of your workspace. Both these links will show you the list of all the manuscripts “pending for attribution”.

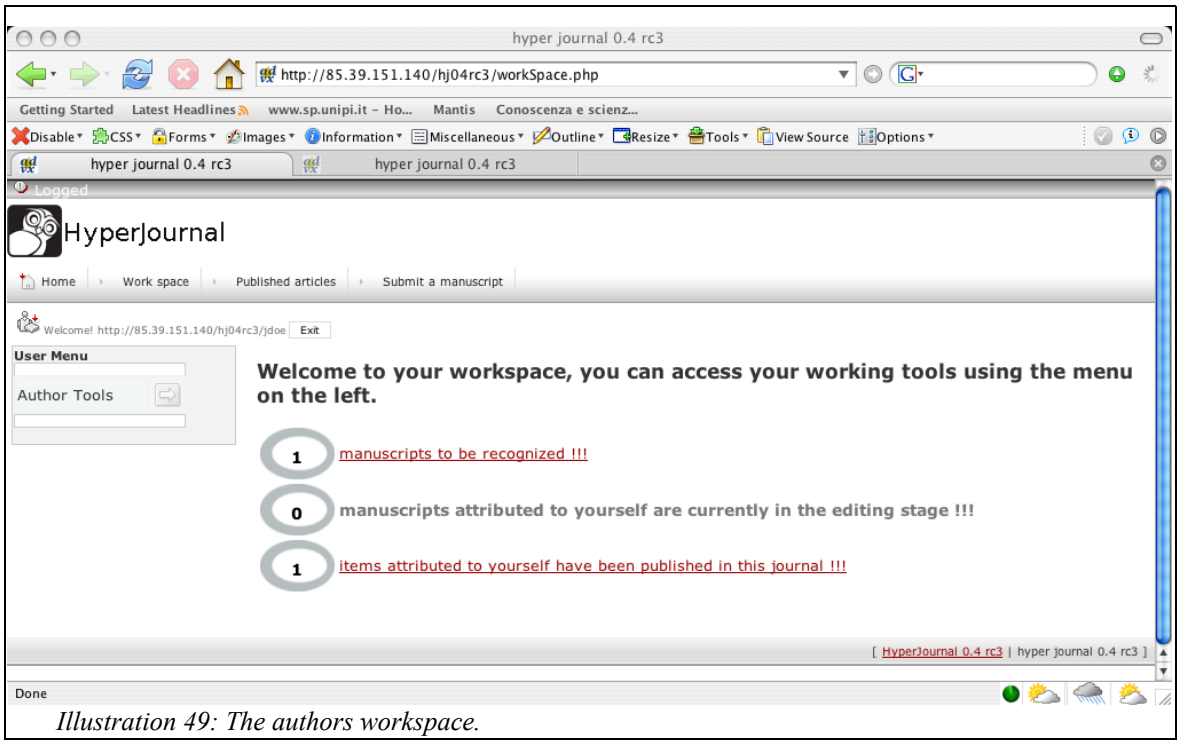

Illustration 49: The authors workspace.

Click on "Attribute authorship" near the title of your manuscript.

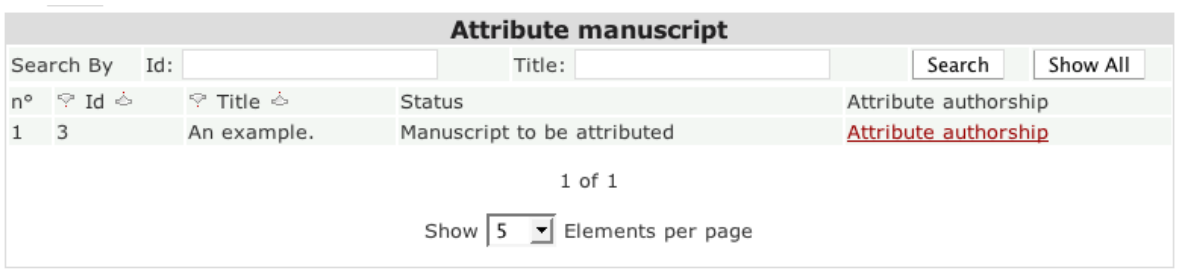

Illustration 50: Selecting a manuscript to recognize.

Clicking the “Attribute Authorship” will open a pop-up window that shows some data about your manuscript.

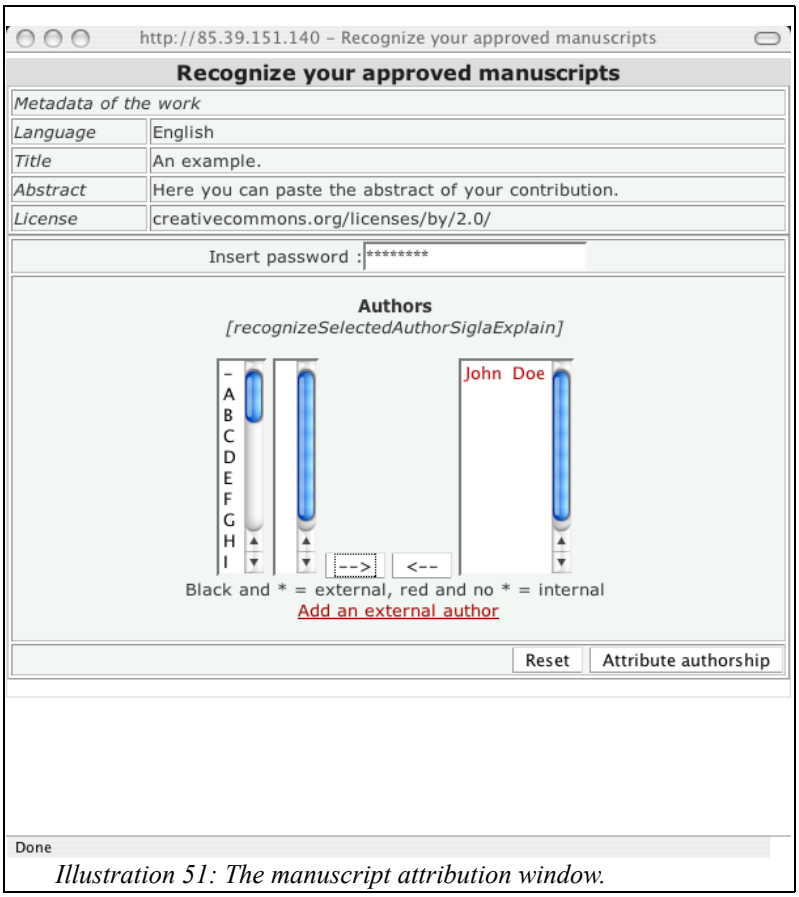

Illustration 51: The manuscript attribution window.

For authorship attribution:

1) Enter the password you chose during manuscript submission.
2) Click on the surname initial of the first author of the manuscript.
3) Select their name from the list.
4) Click on the --> button to move the name to the rightmost box.
5) Repeat steps 2 to 4 for each manuscript author.
6) Finally click on Attribute Authorship.

WARNING If, and only if, you cannot find one or more of the manuscript authors in the list, you can click the "Add a new author" button. Clicking on "Add a new author" will open a pop-up window where you are asked to enter the author name and surname.

WARNING: Please **double check that the author you are going to enter is not already present in the list** before confirming the insertion of a new author. Entering a duplicate or misspelled author name may cause malfunctioning of the entire journal. Misuses of this feature can cause your computer to be blocked from accessing this journal any more.

Editing your article

Once you have recognized your manuscript, it enters the editing phase. During the editing phase the journal editor will contact you in order to make the necessary changes to the manuscript.

To take part in the editing of your manuscript, you can use the “Edit your articles” author tool.

Clicking the “Edit your in editing stage articles” link will open the interface shown in the following figure.

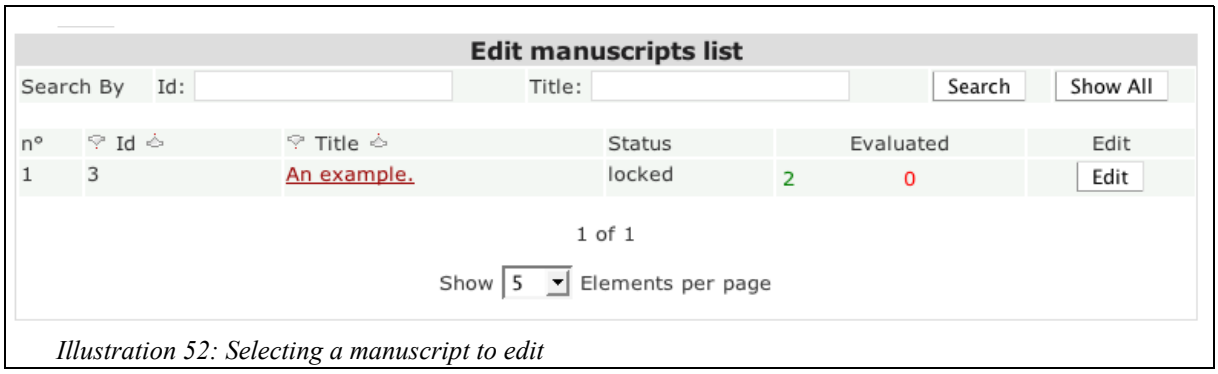

Illustration 52: Selecting a manuscript to edit

Clicking on the Edit button near the manuscript you wish to edit will lead you to the main editing page.

Main Editing Page

The main editing page is split into 4 different areas:

- Change metadata,

- Resources,

- Revision Info,

- Message Area.

Change metadata

Here you can modify the manuscript metadata. Click on Save changed Metadata to save changes.

Resources

The resources area is the most important one. It lists the physical resources (files) that are part of the manuscript. Here you can perform the following actions:

- Create a new revision.
- View the revision history.
- Download and view each single resource.

Revision Info

The revision info panel contains the following information:

- Date: Creation date of the current revision,

- Number: Current revision number,

- Posted By: Creator of the revision (author or editor),

- Accepted by the Editor: Whether the editor has approved this revision or not,

- Accepted by the Author: Whether the author has approved this revision or not,

- Citation Indexed?: Whether the citations in this revision have been indexed or not.

Message Area

The message area is an asynchronous messaging system where the manuscript submitter and the editor can exchange messages about the editing. Each message is marked by its author and the revision number it refers to. To leave a message to the editor (submitter) just type it in the check box and press the Send Message button. The editor (submitter) will then see the message while viewing this page.

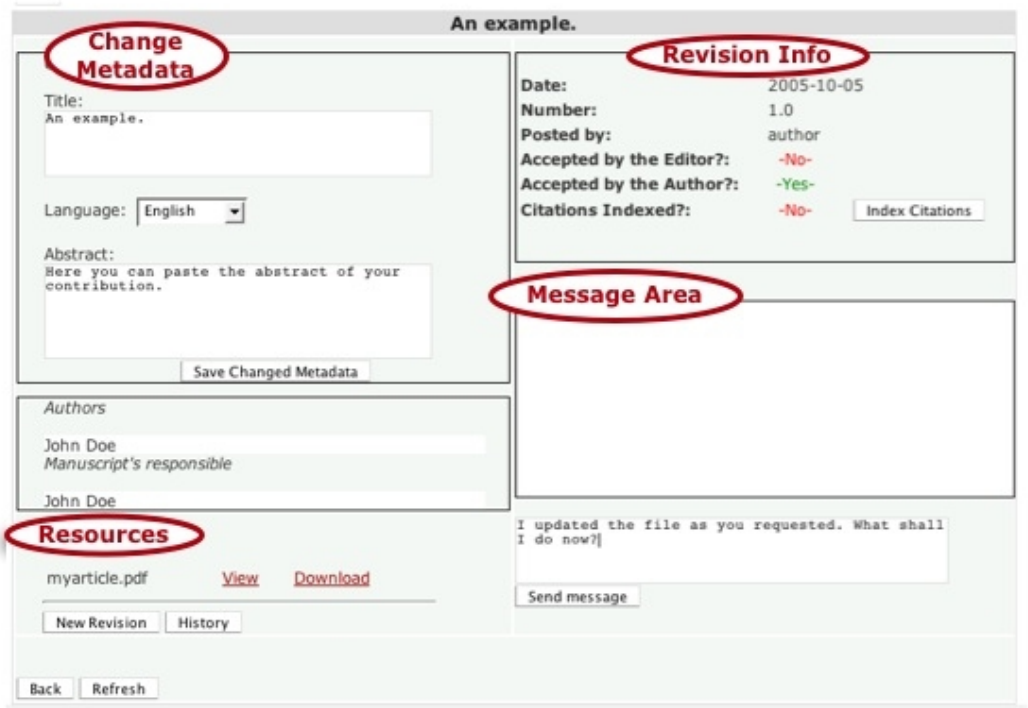

Illustration 53: The editing main page.

How editing works

Revision and Resources

The editing phase groups together several typical tasks of a publishing process (editing, copy-editing, layout editing, etc.). It is during the editing phase that a “manuscript” becomes a “contribution” (also known as an “article”).

The resources are the actual manifestations of a manuscript, the files that form the manuscript (e.g. Its full-text, style-sheets, figures, datasets, videos, audio or whatever is part of it). The first time you access the page as an editor you will see the files sent by the manuscript submitter listed there. As the editing process proceeds, you will make corrections and changes to the original manuscript, and eventually change the file formats (probably to HTML or PDF) by substituting or adding new resources. Whenever you substitute or add a new resource, you will create a new revision. A revision has its own resources (files) and metadata. It also has its own citation indexing, which we will explain hereafter.

File formats and resources

Please note that when you finally approve a revision for publication, thus concluding the editing phase, the revision resources are the files that will be published. So, it is during this phase that you must make sure that the graphic layout of the main file (usually HTML or PDF) is correct and, if it points to other resources (style sheets, pictures, etc), that the links in the main HTML file are correct (they must be relative links). As a best practice we strongly advise the use of XML as an intermediary format for the production of both PDF and HTML. The usage of XML for such a task is, however, outside the scope of this manual; you can ask for more information on the HyperJournal mailing-lists.

Revision history and approval

The “History” button in the resource area allows you to view the complete manuscript revision history. The history shows for each revision the newly added resources and for each substituted resource a comment describing the changes made to that file. You can also revert to previous revisions.

According to your journal settings, each revision has to be approved by both the submitter and the editor or by the editor only. You must approve the revision in order to be able to conclude the editing phase. Before approving a revision you may want to “index citations” if your journal makes use of the Dynamic Contextualization feature.

Citation indexing and Dynamic Contextualization

The Dynamic Contextualization is an advanced feature that enriches the user's experience and automates the process of bibliometric statistics computation.

When the Contextualization is enabled the users will not only be able to see a link to the articles cited but also a link to the articles CITING the one currently being read. For the Contextualization to work, you must signal the citation contained in a manuscript to the system. This can be done by following a standard procedure which will be explained hereafter. It is important to note that if your journal is part of a Contextualization Federation, then Contextualization will work amongst all the journals that are members of the Federation, thus increasing its usefulness. The editor will guide you through the necessary steps to enable your manuscripts for the Contextualization. However, if you want to know more about this, you can read “HyperJournal for Editors: How the editing works” section.

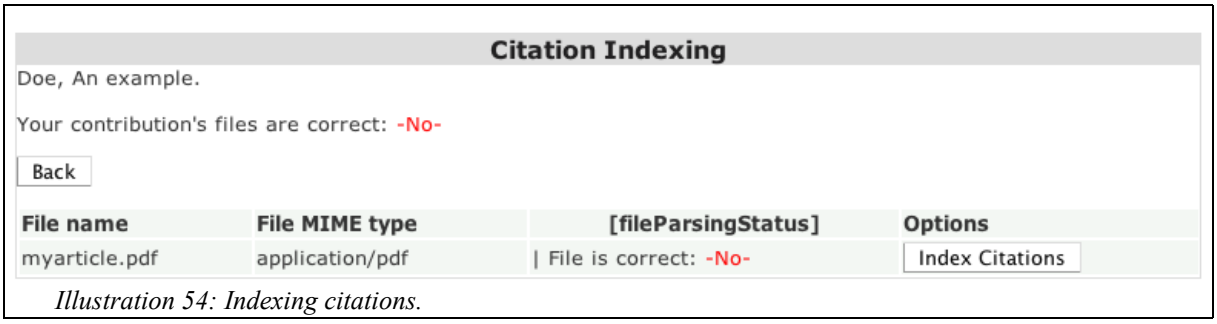

Illustration 54: Indexing citations.

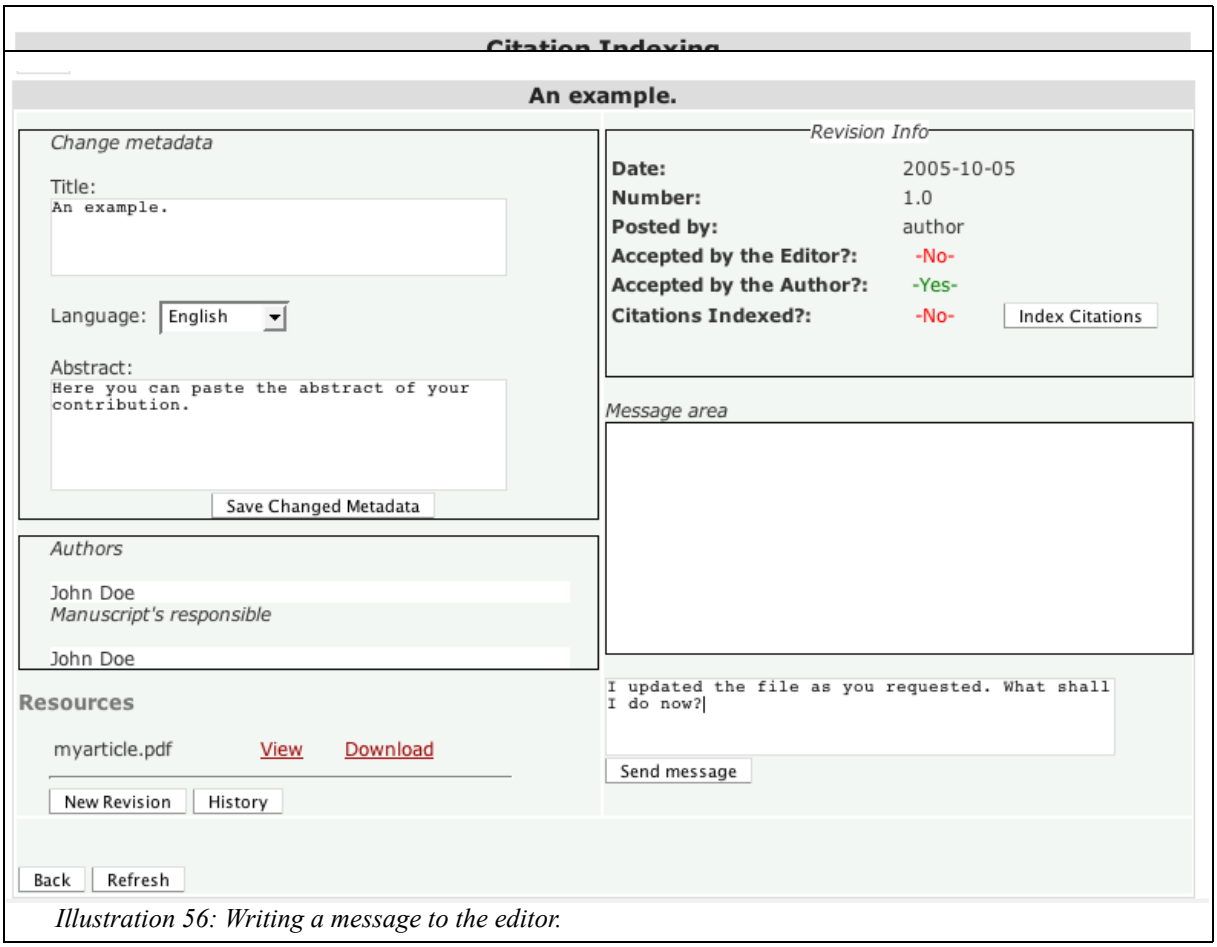

Illustration 56: Writing a message to the editor.

Manage your roles membership

To join a role (e.g. Administrators, editors or reviewers) and acquire the relative permissions and tools, you must accept an invitation to join the role issued by a journal administrator. This panel permits you to accept such an invitation. After you have accepted the invitation to join a role you will effectively be part of that role: the menu in your workspace will change according to the permission given to the role you have joined. Please read the rest of this guide and contact the journal administrators to find out how to use your new tools.

Appendix A: Complete permission list

The following is the complete permission list with a brief description, if necessary. Permissions are grouped in categories. “Committee” reads “role”.

Committee Edit Permissions to manage roles.	**Create committee**	with this permission you can create a committee through: Journal Config -> Control Panel -> Editorial Management -> Roles and Permission
	Delete committee	disabled in hj 0.4
	Change committee name	disabled in hj 0.4
	Change committee permission	with this you can change role permissions through: Workspace -> Journal Config -> Control Panel -> Editorial Management -> Roles and Permission
	Assign user to committee	users can join a role only after they received an invitation. With this permission, you can invite a user to join a committee through Workspace -> Users Management -> Invite users to roles
	Delete user from committee	disabled in hj 0.4

Assign Tasks All the actions for the editorial process management. Permissions to handle the assignment of specific tasks to specific roles, both manually and through the definition of simple rules, are included here automatically.	**Assign eval to committee**	disabled in hj 0.4
	Remove eval from committee	disabled in hj 0.4
	Assign edit to committee	disabled in hj 0.4
	Remove edit from committee	disabled in hj 0.4
	Assign publish to committee	disabled in hj 0.4
	Remove publish from committee	disabled in hj 0.4
	Write evaluation assignation rules	disabled in hj 0.4
	Write editing assignation rules	disabled in hj 0.4
	Write publishing assignation rules	disabled in hj 0.4

Evaluate peer review management	**Eval each contribution**	permission to peer review every contribution through: Workspace -> Peer Review -> Review Manuscripts
	Eval assigned contribution	disabled in hj 0.4 permission to peer review only assigned contributions manually or automatically
	Skip Peer Review	permission to directly accept or reject a contribution disregarding any other evaluation. Go through: Workspace -> Peer Review -> Skip Evaluation
	Skip EvaluationTime	the system chooses to accept or reject a contribution calculating whether the contribution has reached a given threshold of positive evaluations. The decision usually comes after a given period of time. This permission allows to immediately force the system to make the decision based only on the evaluations submitted so far. Go to: Workspace -> Peer Review -> Compute votes

Essay editing Editing, copyediting and proofreading actions	**Edit each contribution**	see "Eval each contribution". With this permission you can lock contributions through: Workspace -> Edit/Publish -> Lock Manuscripts After you have locked a contribution, you can edit it through: Workspace -> Edit/Publish -> Edit
	Edit assigned contribution	disabled in hj 0.4 see "Eval assigned contribution"
	Assign Contributions To Subject	permission to change the subject a contribution belongs to. Go to: Workspace -> Edit/Publish -> Assign Items to subjects

Publish Publishing actions	**Publish each contribution**	disabled in hj 0.4 see "Eval each contribution"
	Publish assigned contribution	disabled in hj 0.4 see "Eval assigned contribution"

Configuration Journal administration permissions	**Just Access ControlPanel**	this permission allows users to see the current settings of the journal. Go to: Workspace -> Journal Config -> Show configuration
	Manage Authors	this permission allows you to establish an equivalence between two authors. Go to: Workspace -> Journal Config -> Author equivalence explicitation
	Edit Categories	this permission allows to edit the subjects' tree, through: Workspace -> Journal Config -> Control Panel -> Editorial Management -> Edit Subjects
	Edit Issues	disabled in hj 0.4 this permission allows you to create issues and bond contributions with existing ones.
	Edit Templates	disabled in hj 0.4 this permission allows you to define the appearance of an issue.
	Manage Publication Criteria	this permission allows to modify all settings related to publication process, through: Workspace -> Journal Config -> Control Panel -> Editorial Management -> Pubilcation criteria, Peer review settings, Enable licenses, Enable languages
	Manage HJ Config	this permission allows to modify all other configurations (typically the server admin ones) through: Workspace -> Journal Config -> Control Panel

Home Homepage editing permissions	**Edit Homepage Composer**	this permission allows to edit the appearance of the homepage's static contents, through: Workspace -> Journal Config -> Control Panel -> Home Page -> Lateral boxes, Article displayed, Static pages, Custom menu