

Better Practices In Journal Metadata

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ISSUED BY

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A Summary of Better Practices

Metadata is an essential aspect of academic publishing. It ensures accurate identification of a journal's content and can improve discoverability, access, dissemination, preservation, and, arguably, research impact. The most important step to better metadata is due diligence.

For best results, journals participating in Coalition Publica should:

- Regularly review journal-level metadata and settings. Make sure to check all your settings but, in particular, review:
 - ◆ **Administration > Site Settings > Languages**
 - ◆ **Settings > Journal > Masthead and Sections**
 - ◆ **Settings > Workflow > Metadata**
- Provide as much information about your journal as you can in the **About the Journal** section.
- Review **About the Journal** regularly to keep it up to date.
- Remember that metadata *describes* the articles in your publication. It is not a way to manipulate the design or layout of your journal website.
 - ◆ Avoid stylistic decisions in journal metadata.
 - ◆ Use custom themes instead.
- Be consistent across your publication and make sure your metadata matches your published PDFs.
- Only use one language per metadata field.
- Don't paste metadata directly from word processing software like Microsoft Word.
 - ◆ Instead, clear formatting using Notepad (Windows) or pasting without formatting with Option+Command+Shift+V (Mac).
- Review all metadata for articles prior to publication. Once your material is published, any indexing or harvesting services may start pulling your metadata before you have time to make changes.
 - ◆ "Measure twice, cut once."

Introduction & Background

Coalition Publica (CP) is a strategic partnership between the Public Knowledge Project (PKP) and the Érudit Consortium. It is a manifestation of a new way of approaching library-based publishing in Canada. It is also a culmination of over a decade's worth of collaboration between the two organizations. The intent, to leverage library-supported publishing at academic institutions Canada-wide and disseminate that content as a quality publisher would (while also meeting Canadian open access mandates), is laudable.

Metadata is an essential aspect of academic publishing. Article metadata disseminates to Google and Google Scholar, and the Microsoft Academic Graph. Metadata from registered Digital Object Identifiers (DOIs) in Crossref and Datacite are leveraged by publishers, persistent identifier systems (ORCID, ROR, ScopusID, etc.), citation management software (Zotero), grant application platforms, UnPaywall, the Open Access Button, and many others.

Good metadata is a time saver. Good metadata is an investment in discoverability, access, dissemination, preservation, and, arguably, research impact. Poor metadata propagates just as efficiently as good metadata, but will take much more effort to correct. Once your material is published, any indexing or harvesting services may start pulling your metadata before you have time to make changes. (Google Scholar, for example, initially indexes publications relatively quickly. However, it can take months for changes to be reflected.) There is a common saying in this space: "garbage in, garbage out." The downstream effect of poor metadata is low discoverability and potentially inaccurate or unreliable information.

Coalition Publica established the Metadata Working Group in the winter of 2019 with the following objectives:

1. Provide guidance and advice on best practices for metadata quality in library-hosted scholarly journals to ensure increased discoverability, especially for Coalition Publica's dissemination service
2. Develop procedures and documentation to guide editors and librarians assisting journals in their creation of high-quality metadata
3. Provide recommendations to Coalition Publica's Operations Team towards improving metadata within PKP's and Érudit's platforms and encouraging the production of better metadata production.

This document is the result of objectives one and two above. It provides documentation and advice to hosting providers, journal managers, and journal editors on properly configuring instances of the Open Journal Systems (OJS) software, at the journal, issue, and article level, to deliver quality metadata to Érudit (or any other organizations with OAI access to your content).

Metadata vs Style/Design

The vast majority of metadata issues in OJS stem from a single problem: a *misunderstanding of the role of metadata and how OJS displays that metadata*. Often, this has to do with users trying to get the website to look a certain way at the expense of the accuracy of the metadata they've recorded. Metadata is supposed to be descriptive, not stylistic.

Honest Mistakes

Let's look at a typical example in Canadian publishing that we'll also address in the [Journal Settings](#) section below.

This is the displayed information for the *Journal of New Brunswick Studies* (JNBS) at the University of New Brunswick (UNB) Libraries:

Journal of New Brunswick Studies / Revue d'études sur le Nouveau-Brunswick
JNBS/RÉNB is an online, multidisciplinary journal that will feature peer-reviewed research and commentary about New Brunswick in English and French. The only such journal of its kind in New Brunswick, *JNBS/RÉNB* seeks to become a forum for ideas and debate about the province and its place in the wider Canadian and global contexts.

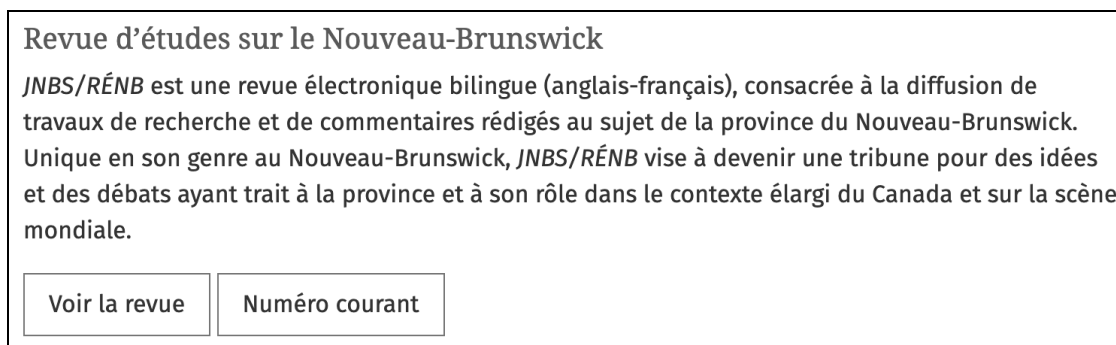
[View Journal](#) [Current Issue](#)

Screenshot of the journal name and description of the Journal of New Brunswick Studies hosted at UNB Libraries.

JNBS is a bilingual journal. There are two discrete titles for the publication identified here, and also both English and French acronyms in their "about" information. This journal has properly configured both languages for their journal and has created mirrored French metadata for all their title-level content.

This journal has properly configured both languages for their journal and has created mirrored French metadata for all their title-level content.

Let's take a look at the **same metadata with the UI language set to French**:



Screenshot of the journal listing in French for JNBS, hosted by UNB Libraries.

The full metadata is seen in both French and English display settings, but the title field in English displays two languages simultaneously. Let's take a look at the title-level settings of the journal:



Screenshot of the "Journal Identity" metadata for JNBS.

Although OJS supports both English and French, the application of bilingual titles in JNBS highlights a few *common* problems. The journal has bilingual metadata, but, because the editors want to make its bilingual identity more explicit, they have put both languages in the English field. This is understandable! New Brunswick is a bilingual province, and the journal wants that identity to be upfront.

The issue arises when we look at a citation generated in English:

Metallic, N. (2020). New Brunswick Needs a Public Inquiry Into Systemic Racism in the Justice System: Nova Scotia Shows Why. *Journal of New Brunswick Studies / Revue d'études Sur Le Nouveau-Brunswick*, 12, 1–8. Retrieved from <https://journals.lib.unb.ca/index.php/JNBS/article/view/31271>

Now, let's look at the French citation:

Metallic, N. (2020). New Brunswick Needs a Public Inquiry Into Systemic Racism in the Justice System: Nova Scotia Shows Why. *Revue d'études Sur Le Nouveau-Brunswick*, 12, 1–8. Consulté à l'adresse <https://journals.lib.unb.ca/index.php/JNBS/article/view/31271>

These citations are not only different, they also don't accurately reflect the journal information associated with [its ISSN](#):

Title proper: Journal of New Brunswick studies.

Parallel title: Revue d'études sur le Nouveau-Brunswick

Other variant title: JNBS

Other variant title: RÉNB

Original alphabet of title: Basic roman

Subject: Dewey : 971.5/1005

Subject: General history

Publisher: Fredericton NB: [University of New Brunswick], [2010]-

Dates of publication: 2010- 9999

Description: Began with: Vol 1 (2010).

Frequency: Annual

Language: English

Language (other): English French

Country: Canada

Medium: Online

Indexed by: ROAD

Small variations in publication title might not seem like a problem, but inconsistent citations will make it harder to track metrics and citation data for authors and the journal. Search engine indexing may be less consistent. If that metadata is propagated by DOIs or otherwise absorbed into the open infrastructure of academic publishing, it will provide inaccurate information *much* more broadly.

Potential Solutions

OJS is both customizable and easily styled, even by journals with limited resources. The *Journal of New Brunswick Studies* can (and does) use a custom header image to represent its bilingual identity.



Screenshot of the custom header image for JNBS.

An image can display both French and English titles without abusing the journal's title-metadata field.

Many of the ways in which users abuse metadata to make their website look a certain way are addressable via custom themes or design work. **It is best to display accurate metadata in a custom way instead of customizing your metadata for display purposes.** It is also worth noting that OJS saves language information for registered users of a journal, so French users can have the site default to French if they wish.

PKP maintains two critical documents on customizing the look of OJS. For design-specific solutions, you can view the [Designing Your Journal](#) guide. For situations where you may want to display hidden metadata or simultaneously display two locales (i.e. languages), you'll need to modify your theme templates. You can learn more about modifying your theme templates with the [PKP Theming Guide](#).

Making Do

Not all problems with OJS metadata are due to a style-centric approach to the platform. Sometimes OJS does not have options for the metadata you wish to enter. For example, OJS didn't always have a single string field for "Preferred Public Name." Often, users with just a single-word, legal name couldn't submit forms without faking metadata. OJS also requires email addresses for submissions, but many users have discovered that not all authors have (or had) email addresses, requiring journal managers or editors to *fake one* to get past a submission screen.

Situations like these can be confusing for the user. When users are unsure where to put information that, to them, is essential, they will make do. *If you are a service provider or*

journal editor associated with Coalition Publica, **it is important to always review author-entered metadata thoroughly.**

A good **general practice** is to think about the downstream effect of bad, false, or otherwise improvised metadata. How will your citations appear in a publication? How will your journal appear in an ORCID¹ record? How will your metadata appear in a library catalogue?

All OJS users are welcome to provide feedback on the [PKP Support Forum](#) when conflicts between display needs and accurate metadata arise so that PKP can address these issues in the software.

Please note that all screen captures and instructions provided in the following sections are for OJS version 3.2, and that the sections are ordered in the way that a user would encounter these settings in OJS, not by priority.

¹ An ORCID iD is a unique, persistent identifier for researchers and contributors that distinguishes them from every other researcher or contributor across disciplines, borders, and time.

Journal Settings

Title-level Metadata

Title-level metadata (i.e. about the journal itself) will be affixed to all metadata outgoing from a publication. This is true for citations as much as it is true for how your journal title appears in ORCID records, Crossref, Google Scholar, and any other number of downstream services that index or harvest your publication. It is essential to check and then double-check your title-level metadata. Furthermore, since this metadata will be so broadly used, changes to it require careful consideration.

Fortunately, it is something you only really need to worry about setting up once. This section addresses the most critical areas to ensure the best possible metadata fidelity throughout the publication.

Languages

Why begin with languages? Because language settings in OJS impact all other settings, so you should set your languages first before inputting or reviewing your other settings.

Many Canadian journals publish bilingual content or, at least, offer bilingual titles, abstracts, and other title- or issue-level metadata. OJS has features to support this, so the most critical step to recording bilingual metadata is to ***enable and properly configure language options in OJS for your journal.***

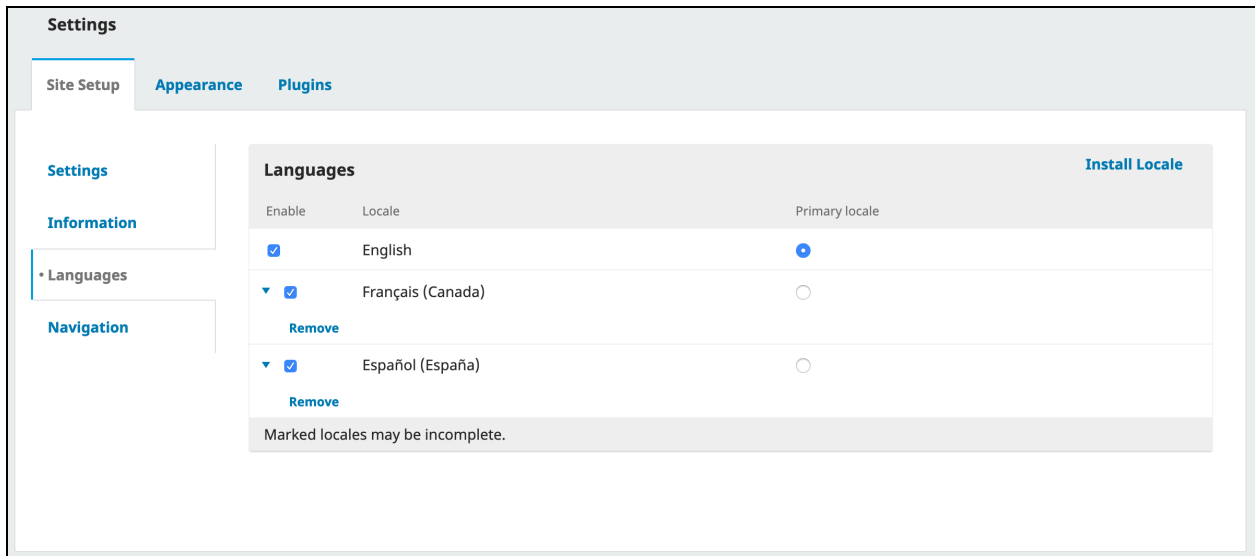
For multilingual journals, language settings are, probably, the single most significant cause for problematic metadata. All too often, users enter multiple languages in single fields or put metadata in incorrect language fields.

Installing the Necessary Languages

You can find your site-wide language settings when logged in as the **administrator** for your OJS installation. From the administration menu, you can:

1. Navigate to **Site Settings**.
2. Under **Site Setup**, click **Languages**.

3. Enable all languages in which you want to record your metadata, noting your primary locale selection.
4. If a language isn't installed, click **Install Locale** and select the necessary language from the link. (Make sure that you've enabled the new language after installing the locale)



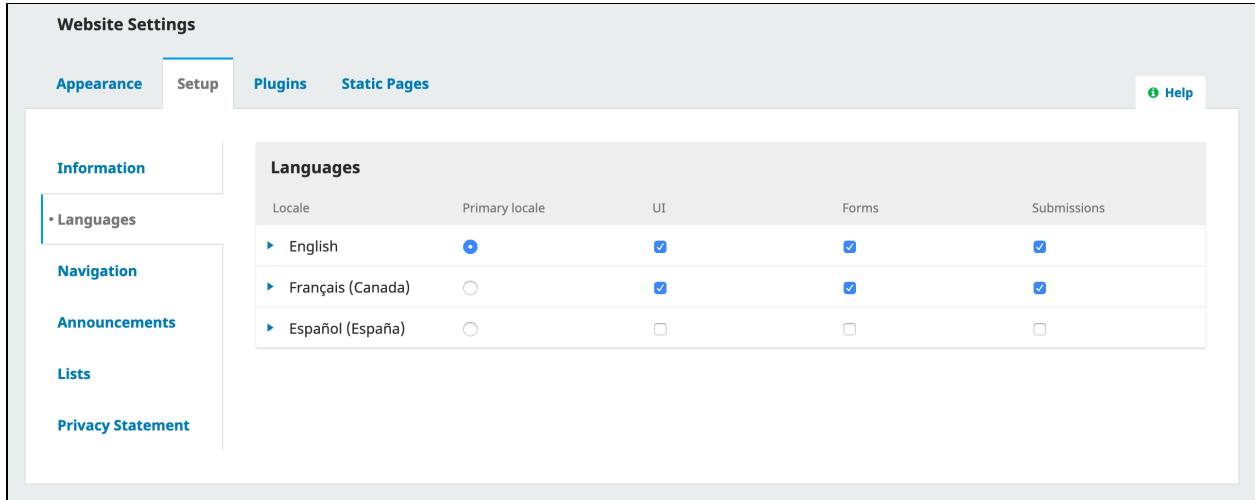
Screenshot of the Languages Settings as the **administrator** in OJS.

These languages will be available site-wide. If you are hosting multiple journals in your OJS install, you'll only need to set this up once to have these languages available to all journals for that installation. *If each of your hosted journals is on its own install or virtual machine, you'll need to enable the required languages for each of them.*

Language Settings for the Journal's OJS Website

To find your journal's language settings:

1. Navigate to **Settings** on the dashboard sidebar.
2. Click **Website**.
3. Click **Setup** on the top navigation bar.
4. Click **Languages** from the left sidebar.



Screenshot of the Languages setting at the journal-/title-level.

Primary locale represents the default language of your journal. It's the language the site will load in for external viewers and also the language in which metadata will, without any user intervention, be recorded.

UI represents the languages available to users to swap between on your journal webpage for both the front-end and the back-end. OJS locales are designed to translate all of the stock copy and navigation for any available language. If you want your site to be available in English and French, for example, you'll want to click the box for "UI" for each language.

Forms will allow any forms in the system (user registration, for example) to be available in the selected languages.

Similarly, **Submissions** represents the languages in which you *intend to receive content*. A journal may, for example, have bilingual navigation but only accept submissions in French. Checking the **submissions** box will enable users to submit materials in that language.

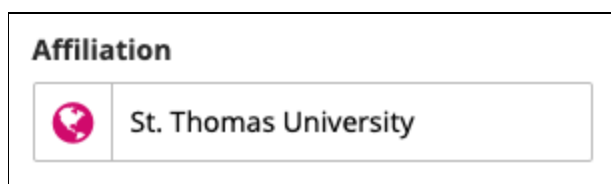
A fully bilingual journal that provides bilingual site navigation and accepts content in more than one language should enable UI, Forms, and Submissions. A journal that provides bilingual site navigation but only accepts submissions in one language would only check the UI box.

Please note that at this time OJS does not support the *display* of multilingual metadata in a unilingual UI. For instance, if you are an English-language journal that provides French

translations of article abstracts, these will only display on the article's landing page if both the English and French UI are enabled.

Reviewing Language Fields

OJS will handily inform you if your multilingual metadata has been filled out. If you have only entered the metadata for one of the supported languages, you'll see a reddish-pink globe icon next to the field. It looks like this:



Screenshot of a field with missing bilingual metadata.

If the field has multilingual counterparts that have been filled out, you'll see a green globe like this:



Screenshot of a field with completed bilingual metadata.

Please note: Not all metadata will *require* a translation, for example proper names of organizations or individuals. In this case, only put your metadata in the required fields of the primary language. **OJS will automatically default to the language available in the metadata for any metadata that's missing.**

Dos and Don'ts

→ Do

- ◆ Enable all the languages (Locales) associated with your journal(s) at the platform-level.
- ◆ Configure your language settings to reflect the UI and submissions options your journal(s) are utilizing.

→ Don't

- ◆ Skip your language settings.

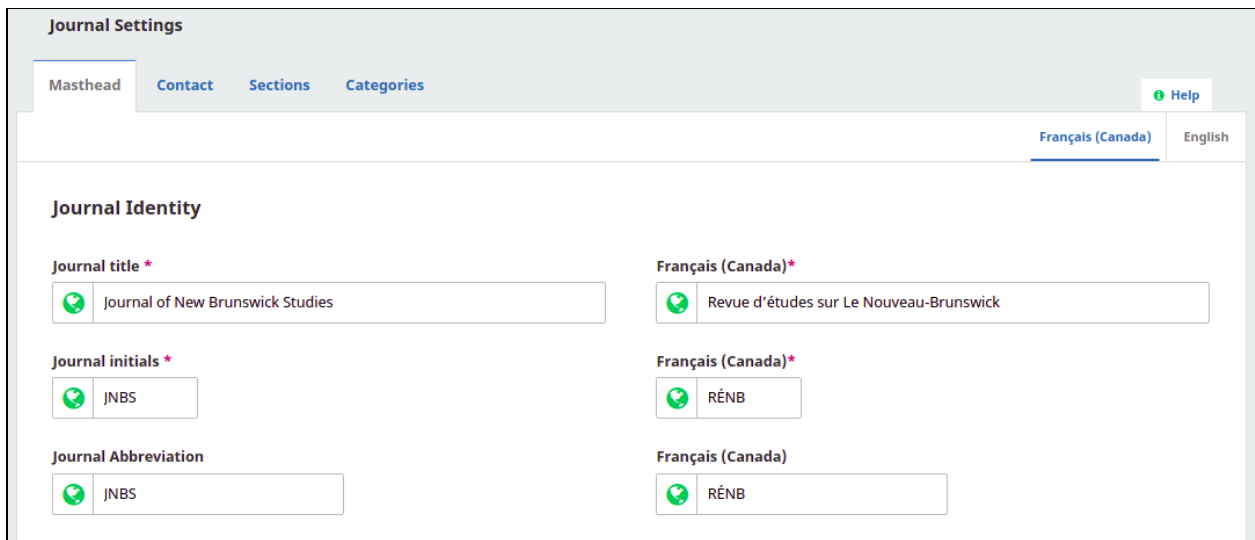
- ◆ Put your users in a situation that encourages them to enter metadata in the wrong language/field because you haven't made it available to them.

Masthead

Journal Identity

OJS has fields for **journal title**, **initials** (acronym), and **abbreviation** (shortened title). Once you have begun publishing, it is strongly recommended to not modify these fields, except in the case of a title change. (See the following section for more information about title changes.)

None of these fields should contain more than one language. (See the previous section about [Languages](#) if your journal is bilingual or multilingual.)



The screenshot shows the 'Journal Settings' interface with the 'Masthead' tab selected. The 'Journal Identity' section is visible, containing three rows of input fields. Each row has a 'Journal title *', 'Journal initials *', and 'Journal Abbreviation' field on the left, and a 'Français (Canada)*' field on the right. Each field has a green checkmark icon to its left. The 'Journal title *' field contains 'Journal of New Brunswick Studies' and the 'Français (Canada)*' field contains 'Revue d'études sur Le Nouveau-Brunswick'. The 'Journal initials *' field contains 'JNBS' and the 'Français (Canada)*' field contains 'RÉNB'. The 'Journal Abbreviation' field contains 'JNBS' and the 'Français (Canada)' field contains 'RÉNB'. The interface also shows a 'Help' button and language selection options for 'Français (Canada)' and 'English'.

Screenshot of the OJS Journal Settings/Masthead

There is also a **Path** field that serves to establish the journal's URL. It's best to avoid any characters in this field that might mess up a URL. [UTF-8 encoding](#) is supported in OJS, but it will cause many headaches to put, for example, an "@" symbol here. Also, it is recommended to not change this field once it is set, even in the case of a name change.

Path *

https://journals.lib.unb.ca/JNBS

Screenshot of the Path field in Journal Settings/Masthead

Publishing Details

Publishing details include:

- Publisher
- Online ISSN
- Print ISSN

These details are likely to be pushed out whenever your journal is indexed, archived, or harvested. ISSN, in particular, is essential, especially in the tracking and discoverability of serials. Important details about ISSNs include:

- Significant changes/modifications to the journal title usually result in the assignment of a new ISSN to the journal. Such changes must be communicated to your national ISSN agency (in Canada, this is [ISSN Canada](#)). Changes to subtitles or translated titles do not require a new ISSN, but should still be communicated to your national ISSN agency, regardless.
- All active ISSNs must be used in an OJS instance and should be entered in the appropriate fields in Journal Settings/Masthead.
- The print ISSN of the journal should only be entered in OJS metadata if a journal continues to publish a print edition (print ISSN use should cease when printed versions stop).
 - You can record prior/defunct ISSNs on your "About the Journal" page.
- Other title-level metadata (publisher, frequency of publication etc.) should be kept up to date both in OJS and your ISSN record(s).

For more information on journal standards and identifiers, please see PKP's guide [Getting Found. Staying Found.](#)

Key Information and Description

These fields are an excellent opportunity to include information you want to convey to your readers and potential authors. The **About the Journal** section is important because it

includes all of the information authors will employ to evaluate whether or not they want to publish with you. Some indexers also use this publicly available information to evaluate your journal against their selection criteria.

The **About the Journal** section should be used to communicate the following:

- Editorial team/board members
- Aim and scope
- Review process
- Instructions for authors
- Fees, such as Article Processing Charges (APCs) or submission fees
- Open access policy
- Copyright policy and license used by the journal
- Self-archiving policy
- Digital preservation policy
- Plagiarism and other ethical policies
- Former title(s) and ISSN(s)

Dos and Don'ts

→ Do

- ◆ Keep your essential publication information up to date in OJS and with your national ISSN agency.
- ◆ Use **About the Journal** to express details you want authors, readers and others to know.

→ Don't

- ◆ Change your journal title or essential publication information without notifying your national ISSN agency.
- ◆ Put the journal's print ISSN in your metadata if you no longer have a print edition.
- ◆ Put two languages in a single field.

Journal Sections

Journal sections in OJS are intended to delineate between things like Articles, Book Reviews, Interviews, etc. They allow journals to configure specific policies for submissions

to those sections and also provide workflow parameters for editors assigned to those sections.

Try to keep your sections limited as this will help authors submit to the correct place. Only create sections that will be part of your published issues. You should not use sections to convey a stage of the publishing process, such as “In Press,” as your articles will be indexed with this section metadata attached. Also make sure to provide translations for each section if your journal is multilingual.

Additionally, it's surprisingly common for journals to ignore the section settings. For example, abstracts are required by default. This usually results in a lot of authors plopping "NA" into the abstract field when it shouldn't exist for them at all. Check “Do not require abstracts” for any journal section you know won't have them, or have them regularly. Make sure to review regularly all your section settings for every available section.

Dos and Don'ts

→ Do

- ◆ Keep it simple.
- ◆ Provide translations for sections.
- ◆ Configure section settings in line with your editorial policies and submission options.
- ◆ Regularly review section settings to keep them up to date.

→ Don't

- ◆ Create sections specific to your editorial workflow that aren't used in publishing, such as “In Press.”
- ◆ Check the “Do not require abstracts” option if a section doesn't have abstracts.

License and Copyright Metadata

You might be surprised to learn that licenses and copyright count as metadata and that this metadata is affiliated with the articles in your journal. It is hugely important for everyone who might consult or make use of the journal's content to have intellectual property/license information accurately represented via metadata. That metadata can determine how the work may be used in other locations via harvesting or indexing.

Please make sure that you've correctly configured your license information in OJS. You can find it by going to **Settings > Distribution > License**.

Too often the copyright settings contradict the licence. For example, an open access journal uses a CC-BY license and that's what's indicated in their author agreement and published PDFs, but its licence settings have a CC-BY-ND license. In addition, license information may be included in the **About the Journal** page, author submission guidelines, and journal front matter.

Dos

→ Do

- ◆ Configure your journal's licensing information before you publish.
- ◆ Review your licensing information regularly to make sure it reflects what you're telling authors regarding open access, self-archiving, and sharing their publications.
- ◆ If you change your license/copyright information, make sure to update it in *all* the places it's mentioned in your journal.

Issue and Article Metadata

The Day-to-Day

Assuming that you've been diligent with your journal setup, you probably will not need to review your settings too often. But mistakes in title-level metadata must be rectified because they are affixed to everything a journal publishes.

Issue- and article-level metadata, however, are a lot more abundant in journals. There is more opportunity for mistakes, user-error, and metadata abuse. Additionally, **every academic discipline has its own culture of publishing**, replete with specific styles, habits, patterns, and preferences. These often make their way (sometimes inappropriately) into metadata.

Issue-level Metadata

OJS has the following fields for issue-level metadata:

- Date Published
- Identification
 - Volume
 - Number
 - Year
 - Title
- Description

These are all enabled by default at the issue-level and in the **Archives** listing that shows all published issues. But it is possible to select which of these metadata fields *display* on an issue-by-issue basis.

To find your issue-level settings:

1. Go to **Issues** on the dashboard sidebar.
2. Click **Future Issues** / **Back Issues** depending on which you're editing.
3. Click **the toggle arrow** next to the issue you want to edit.
4. Click **Edit** on the expanded menu below the issue.
5. Click the **Issue Data** tab on the top menu.

You will see some metadata fields here and, below them, a checkbox next to volume, number, year, and title. These checkboxes determine whether or not the entered metadata will display on the site view. However, it is worth noting that the metadata within these fields will be available via OAI or metadata export regardless of display choice, so your issue metadata must still be accurate.

Issue Title

Easily, the most common metadata problem with issue metadata is a misunderstanding about the purpose of the "issue-title" field. Users sometimes turn off the display for the volume, number, and year fields in order to write out the issue information as a single string. For example, instead of "**Vol. 56 No. 2 (2020)**" (the OJS default rendering), they'll write in something like "**Volume 56, Number II, Spring 2020**". Users do this sort of write-in title for all kinds of reasons, for example:

- Users may want to display their volume and issue numbers in Roman numerals (or whatever unique characters they used in print)
- Users want to use "Volume" and "Number" instead of "Vol." and "No." (the OJS standard display)

The downside is that in the harvested/indexed metadata, this article will now show the following: **Vol. 56 No. 2 (2020): Volume 56, Number II, Spring 2020**.

The intention for the title field in OJS is as a "*special issue title*" or as something *aside from existing volume, number and year metadata*. The one exception to this is season (ex: Spring, Fall), since there is no specific field for this within OJS currently.

If you need to write in your seasonal metadata at the moment, the best way to do so is to enable display for all issue metadata fields and simply write your seasonal metadata in the "title" field by itself. Ultimately, this may result in a less than ideal display (**Vol. 56 No. 2 (2020): Spring**), but it will at least ensure you are not duplicating your issue-level metadata.

Additionally, some of these issues could be solved by editing OJS templates, but many of OJS hosting providers (in particular, multi-site OJS instances hosted at universities) are likely to shy away from template edits to solve unique display issues.

Description

Similarly, it's not terribly uncommon for users to put custom content in the "issue description" field. This is less problematic, but generally discouraged.

The description field displays above the issue's table of contents. It may seem a convenient way to highlight certain points, such as an editorial or an announcement about an upcoming issue. However, indexing or harvesting organizations may end up pulling unintended content from your issue metadata. Issue descriptions should be used to describe the current issue. For example, a special issue *festschrift* with a thematic title might include the description "Essays in honour of..."

Dos and Don'ts

→ Do

- ◆ Fill out volume, number, and year metadata.
- ◆ Use Issue-Title specifically for special issue titles.

→ Don't

- ◆ Re-write issue metadata in the Issue-Title field for display purposes.
- ◆ Put content that doesn't describe the issue in the "issue description" field.

Article-level Metadata

Article-level metadata in OJS is the most likely to be problematic in one way or another for a lot of reasons. The two most important are: 1) because you have more articles than you do issues; and, 2) because a huge portion of the metadata is actually **dependent on authors**, over whom you have varying control and who have varying degrees of technical literacy.

While you can bake a lot of requirements into your submission guidelines, we know that it doesn't mean all authors will follow those guidelines. Much of this work is incumbent on editors or other journal staff who are often volunteers or under-resourced.

This section will aim to break down the most essential metadata for articles and some general rules that will help.

Ground Rules

Consistency is key. // You may have some "house rules" or stylistic guidelines for your journal and the way that metadata is recorded. For example, it's not uncommon in the

sciences to record names as initials and a last name instead of full names. Ideally, you'd record all metadata in full, but the most important thing is that *your metadata should be consistent across your publication*. If you have published many works from Robert Jones, you should make sure they all say R. Jones. They shouldn't rotate between R. Jones, R.B. Jones, Bob Jones, Rob Jones, and Robert B. Jones.

This is not just true for names. For example, titles should follow consistent capitalization conventions, though these may vary according to language. Try to keep your metadata "styles" as consistent as possible and in accordance with whatever citation style you use. We'll address some more specific examples further along.

Metadata should be the same everywhere. // Anywhere a piece of metadata appears, it should be the same as every other place that it is recorded. For example, the title of an article should be *exactly* the same in its published PDF galley and in the metadata recorded in OJS. (Keep in mind that typically these were provided by the author at the time of submission. The title may have changed during the peer review process.) Depending on how you publish, that title might also be in a PDF of an issue's table of contents. **No matter how many places the title appears, it should always be the same to avoid confusion.** Ditto for author names and affiliations. (This rule applies to Journal-Level and Issue-Level metadata as well, but as previously mentioned, the plethora of Article-Level metadata makes this a particular challenge.)

Try to avoid directly pasting text copied from Microsoft Word. // It's common practice by authors to copy and paste an abstract from, say, Microsoft Word or some other application with embedded formatting. A pasted chunk of text might have hidden line breaks that are problematic downstream for metadata use. As an example, we'll use this paragraph:

"Additionally, it's common for an abstract to have been pasted in by an author from, say, Microsoft Word or some other platform with embedded formatting. A pasted chunk of text might have hidden soft returns that are problematic downstream for metadata use."

In an XML export, this text would look like this:

```
<abstract>Additionally, it's common for an abstract to have been pasted in by an author from, say, Microsoft Word or some other platform with embedded formatting. A pasted chunk of text might have hidden soft returns that are problematic downstream for metadata use.
</abstract>
```

Notice how the words separated by line breaks have run together?

There are a number of ways to clear formatting. In Windows you can first paste your text into Notepad to strip formatting. On a Mac you can paste without formatting by using Option+Command+Shift+V (you will never paste a different way again).

Do not accessorize your metadata. // Name fields should only contain names. Titles should only contain titles. You may have a colleague who really wishes that DOIs were on the table of contents and decides to put them in *subtitle* fields. That *will, for sure, put the DOIs in on the table of contents*, but it *will also break all of your subtitle metadata because this is not where this information is supposed to go*. It is always recommended to fill out metadata fields (no matter how little you might use them) with only what is asked.

One language per field. // As we've addressed already in this document, if you have any multilingual metadata in your journal you should make sure that it lives in its own language-specific form. Check to make sure that, in the [Languages](#) settings, you've enabled all forms for submission-appropriate languages. Make sure to review author-entered metadata in all configured languages before publishing.

All-caps titles/metadata are stylistic and can be implemented with a custom theme. You shouldn't yell metadata. // In some disciplines it is common, stylistically, to write article titles in all caps. This is both unnecessary and frustrating for everyone else who has to change this metadata in their reference lists in Zotero or publication records in ORCID or any other number of places. You can make text display in OJS however you want, such as in all caps, with a custom theme. See the [PKP Theming Guide](#). (At the very least, if you are publishing your titles in all caps, do it consistently.)

Now that we've covered those ground rules, we can look at the individual elements of article-level metadata, which can be accessed by selecting a submission, clicking **View Submission** and then opening the **Publication** tab.

Title & Abstract

Prefix // A field for what librarians and developers refer to as "stop words". If an article title starts with "A" or "The," (or "Le," "La," "L," "Un" or "Une" in French) and you don't want an alphabetical list of the journal's articles to show a long list of publications starting with "The" or "Le", put those words in the *prefix* field.

Title & Subtitle // The title and subtitle of your article. OJS used to only have a single title field but now has the option to break your metadata across two fields. Please note, if you use both the Title *and* Subtitle fields, do not include a colon after your Title. OJS will automatically insert that colon where needed. It doesn't really matter if you use just one title field or all three (Title, Subtitle, and Prefix , so long as you *populate these fields consistently across your journal*.

Abstract // The abstract of your article. If there isn't an abstract associated with your article, please make sure this field is empty. If you have multiple abstracts in different languages, please make sure to insert those translations into the fields for other languages. *Do not put multiple languages in one abstract field*. If you consistently see placeholder text in abstract fields, select “Do not require abstracts” in your **Sections Settings**. Additionally, there is no need to place the words "Abstract" or "Résumé” in your abstract metadata. OJS will display these automatically as part of the user interface.

Contributors

Contributor information is one of the most common places that metadata errors arise. Since OJS pulls initial contributor metadata from the author's user profile during submission, the author might not review it before publication. It is also easy to overlook from an editorial standpoint. Before you publish an article, make sure to review author information.

In OJS 3.2, you can find the contributors list for a submission by navigating to **Publication** and selecting **Contributors**. You can edit a record by clicking the *small expansion arrow* next to a name and clicking **Edit**.

The screenshot shows the OJS 3.2 interface for a submission. The top navigation bar has 'Workflow' and 'Publication' tabs. The status is 'Unscheduled' and there is a 'Schedule For Publication' button. The left sidebar has 'Title & Abstract', 'Contributors', 'Metadata', 'Identifiers', and 'Galleys' sections. The 'Contributors' section is active, showing a 'List of Contributors' table with one entry: System Administrator, Journal manager, Primary Contact, and In Browse Lists. There are 'Edit' and 'Delete' buttons for this entry.

Name	E-mail	Role	Primary Contact	In Browse Lists
System Administrator		Journal manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Screenshot of the contributors list from the publication metadata.

Name(s) // As of OJS 3.2, the only required name field in a publication is the *Given Name* field. Not all cultures use the same Given-Name Family-Name format familiar to many Western countries. There is no longer a middle name field in OJS metadata. Users who wish to be addressed in a specific way unmet by Given-Name Family-Name should put that preferred name in the *Preferred Public Name* field.

It is important that you include author naming conventions in your submission guidelines. OJS 3.2 allows for a "preferred public name" field that, really, should not be altered by editors in terms of style or contents. If there are stylistic concerns for display consistency, editors should review or discuss these issues with the authors directly. You do not want to assume anything about the identities of your submitting authors by altering their name without their permission.

It is important to review name metadata because the name may have been submitted differently in a prior publication in your journal. For example, imagine I am the primary author for a submission. My name in submission metadata will be automatically populated with the information in my user profile in the journal's OJS. But, for my co-authors (who may or may not also have user profiles in this journal), I might enter a name that does not match what appears in their profile. It is always best to review.

Email // There is no more contentious issue! OJS was designed to be used as a submission system and submissions were designed to be associated with user profiles and accounts, so email is a required field. But, not all authors on a submission will have an email address.

It's possible that editors may enter a submission *on behalf of an author*. It's also possible for editors to submit back-issue content written by individuals who died well before the ubiquity of email. **So, what do we do about email addresses we don't have?**

The long and the short of it is that *it doesn't matter as long as you do it consistently*. One recommendation is to use the domain *@example.com*. This domain doesn't resolve and is commonly used for user testing or demonstration. The email address *none@example.com* for all unknown or inappropriate email situations will make it easily spottable in the future, and it won't do any harm in the short term until such a time as OJS does not require email addresses as metadata.

Affiliation // Depending on whether an author submitted the work themselves or it submitted for them (say, by a co-author, or the journal's editor), you may see anything from way too much information to no information at all.

Before publishing, you should always review affiliation information in every article and make sure that the affiliation(s) used in the article's published galley(s) (ex: PDF) match(es) the affiliation(s) in the metadata. Author affiliation is a required metadata for journals participating in Coalition Publica.

Country & User Details // These fields are less vital but, as always, try to keep these consistent and use multilingual features where needed. ORCID iD, for journals that have configured the plugin, in particular, will be useful for authors if they've provided it. They'll be appreciative when your clean metadata ends up automatically in their publication records.

Other Article Metadata

Identifiers // This is where DOIs are assigned. This tab will only appear if the journal is configured to assign DOIs within OJS. Just a note in general that DOIs do not need to be (and are actively discouraged from being) human readable. They are *not* custom URLs.

Permissions & Disclosure // This is the section for copyright and license statement for a given article. It will be pre-populated with whatever the author chose on submission but please review it before publication. Copyright holder, year, and license URL are all passed along as metadata.

Issue // This is where you assign an article to an issue and provide **pagination**. You should include page numbers, in the format "*firstpage-lastpage*". Page number metadata is especially important when used in automatically generated citations.

In some of the most-used citation styles/standards, the pagination is a required metadata field for research articles. It's not uncommon for pagination to change throughout the publishing process so please review before publication. Additionally, make sure that the article is slated for the proper journal section. You *can* edit your URL path, but it is not recommended unless you're quite sure what you're doing.

Keywords // Keywords are typically one- to three-word phrases that are used to indicate the main topics of a submission. **It is important to avoid entering keywords as a single block**

of text. Add a new keyword for each individual term/phrase. Pressing "enter" after each keyword will separate them.

References // Collect a submission's references in a separate field. This may be required to comply with citation-tracking services such as Crossref. For journals participating in Coalition Publica, Érudit recommends that references are added to an article's metadata according to the following guidelines:

- Only include references found at the end of the article, i.e. the bibliography or the list of works cited. Do not include endnotes or footnotes. If the article does not have a bibliography, do not include any reference metadata.
- The references in the article's PDF and metadata should match. Update them if they have changed since the original submission.
- Separate each reference on its own line.
- Do not include any text other than the references themselves, such as the subtitle "Bibliography."
- Format references as plain text. Do not include HTML or XML formatting tags, such as italics (<i></i>).
- Do not format the references in the form of a list, for example, with numbers or bullet points preceding each reference.
- When several works by the same author are cited, do not replace the author's name with a dash. All references must contain the name of the author.
- Regardless of the citation style used (MLA, APA, Chicago, etc.), all references must be complete, containing the characteristic elements that allow the identification of the works cited.

Additional/Optional Metadata

There are a few additional options for publication metadata you can add. You can find all of the additional options by going to **Settings > Workflow > Metadata**. You may add the following Dublin Core metadata items:

- **Coverage** // Coverage refers to the extent or scope of the topic of the article, and will typically indicate a spatial location (a place name or geographic coordinates), temporal period (a period label, date, or date range) or jurisdiction (such as a named administrative entity).
- **Languages** // A single- stringed, plain-text field for additional language metadata not covered in the submission process.

- **Rights** // Any rights held over the submission, which may include Intellectual Property Rights (IPR), Copyright, and various Property Rights.
- **Source** // The source may be an ID, such as a DOI, of another work or resource from which the submission is derived.
- **Subjects** // Subjects will be keywords, key phrases or classification codes that describe a topic of the submission. **These are, however, distinct from Keywords proper and should be used for things like cataloguing, not general description.**
- **Type** // The nature or genre of the main content of the submission. The type is usually "Text", but may also be "Dataset", "Image" or any of the [Dublin Core types](#).
 - For the purposes of Coalition Publica, however, it is recommended to use the types suggested by JATS (<https://jats.nlm.nih.gov/publishing/tag-library/1.2d2/attribute/article-type.html>). **The “research-article” type should be reserved only for articles that pass through a peer review process.**
- **Disciplines** // Disciplines are types of study or branches of knowledge as described by university faculties and learned societies.
- **Supporting Agencies** // Supporting agencies may indicate the source of research funding or other institutional support that facilitated the research.
- **Publisher ID** // The publisher ID may be used to record the ID from an external database. For example, items exported for deposit to PubMed may include the publisher ID. This should not be used for DOIs.

These fields can be disabled, made optional for authors on submission, or *required* for authors on submission. Most of these are quite granular and are only recommended if there is sufficient time to vet metadata.

It is highly recommended to keep these options as simple as you need for your journal. The more information that unsure users have to populate, the more likely it is they will fill things out with filler or inaccurate information.