Preparing Quality Metadata in OJS

A Guide for Journals on Érudit

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About This Guide

This guide was prepared by Érudit to help journals participating in Coalition Publica (i.e journals that use PKP’s OJS software and that are disseminated on erudit.org) to properly prepare their metadata in OJS to optimize their production at Érudit and improve the discoverability of their OJS journal online.

It was informed by the work of Coalition Publica’s Metadata Working Group, which prepared a report entitled Better Practices in Journal Metadata, published in the fall of 2021. This guide seeks to both summarize that document and evolve as necessary to reflect developments in OJS and metadata standards.

This guide attempts to follow the internal logic of OJS and address each metadata element in the order that an editor would naturally encounter it in OJS. OJS version 3.3 served as the version of reference for this guide. If your journal is using another version of OJS, the areas of OJS where a particular metadata element is found (called out in bold) may be different, but the recommendations about how to complete that metadata element should still be relevant to you.

Throughout, the terms required and required, if applicable are used for the metadata that Érudit needs to produce your journal for dissemination on erudit.org, not in reference to OJS. The term recommended is used to encourage best practices that might not impact Érudit’s production but may improve your journal’s discoverability or display.

Metadata problems in OJS are often related to a desire to display a journal’s metadata in a certain way. This guide is focused on the quality of metadata, so where metadata standards conflict with display, metadata standards will always be prioritized.

In regards to language, this guide is adapted for Coalition Publica’s Canadian context and refers throughout to English-French bilingualism. If your journal is multilingual (publishing in 3 or more languages) or is bilingual with languages other than English and French, the recommendations regarding managing bilingual metadata should still be relevant to you.

Please note that Érudit does not require your journal to modify the metadata of previously published issues to be in line with this guide. The requirements in this guide apply only to your journal’s forthcoming issues.

Also note that all the actions outlined in this guide can be performed by OJS users with the roles of Journal Manager or Editor, unless otherwise specified.
The Importance of Metadata

There are two main reasons that your journal should make metadata quality a priority:

First, Érudit harvests your journal’s metadata and content directly from your OJS. This is made possible by the JATS Template plugin and the OAI JATS plugin, which you were required to install in your OJS. These plugins make your journal’s metadata and files available in the JATS XML\(^1\) format, via OAI-PMH\(^2\). This allows Érudit to ingest your metadata into our production system. Once there, our production team reviews it, makes corrections (if necessary), and then disseminates it on erudit.org. Quality metadata makes this production process more efficient.

Second, OJS makes your journal’s metadata available for other indexing services, such as Google Scholar, to find and use. Therefore, preparing quality metadata in OJS is a general investment in the discoverability, dissemination, and, arguably, research impact of your journal. Poor metadata propagates just as efficiently as good metadata, but reduces discoverability and may circulate inaccurate information about your journal.

Journal Settings

The first step to preparing quality metadata in OJS is to ensure that several site-level and journal-level settings are properly configured. Most of these settings will need to be configured only once, though it is recommended that you review them from time to time.

Language

You should begin by configuring the languages for your journal, because language settings in OJS impact all of its metadata fields, making additional language-specific fields available for each metadata element.

All journals are required to properly configure their OJS for the language(s) of their journal.

In OJS, languages must be configured in two stages.

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OJS Instance Language Settings (Locale)

First, a "locale" for each language of publication must be installed for your OJS instance. An OJS instance can be standalone (one OJS = one journal) or shared (one OJS = multiple journals). For a shared OJS instance, installing a locale makes that language available to be configured for all the journals, even if that language may not be used by all the journals.

A locale must be installed by a user with the Admin role. To access the language settings of the OJS instance, go to Administration > Site Settings > Site Setup > Languages. Click Install Locale, and select the locale(s) to install.

English is the default language of OJS. If the journal or journals on the OJS instance publish articles in French or any other language, it is **required** that the locales for those languages are installed. While there are multiple locales for French available in OJS, the Français (Canada) locale is **recommended** for journals on Érudit.

Select a **Primary locale** to be the default language of the OJS instance. Each journal on a shared OJS instance will be able to set their own default language.

Journal Language Settings

Once the appropriate locales are installed in your OJS instance, you can configure the language settings for your journal’s OJS website. To access the language settings for your journal, go to Settings > Website > Setup > Languages.

If you do not find all of the languages of your journal listed here, contact your OJS Administrator and request that the appropriate locale be installed (see OJS Instance Language Settings (Locale), above).

If you publish articles in more than one language (even if you do so infrequently), it is **required** that you select **Forms** and **Submissions** for all languages in which you publish. Selecting Submissions
allows articles to be submitted in that language and enables article metadata to correctly identify the language of the article. Selecting Forms makes it possible to create metadata in that language.

If you provide translated metadata (ex: bilingual article titles, abstracts, or keywords), it is recommended that you also select UI (which stands for User Interface) for those languages. The UI setting allows users to view your OJS website in those languages. OJS will translate the navigation and the stock copy for any enabled UI.

Understanding how the UI setting impacts the display of metadata may help you to decide which ones to enable. Here are some examples:

- When bilingual metadata is present and properly entered, and the UI is enabled for both English and French:
  - Users viewing your website in English will see only the English metadata;
  - Users viewing your website in French will see only the French metadata.
- When bilingual metadata is present and properly entered, but the UI for only one language (ex: English) is enabled:
  - Users viewing your website in English will see only the English metadata;
  - Users will not be able to see the French metadata.
- When unilingual (ex: only English) metadata is present, with the UI enabled for both English and French:
  - Users viewing your website in English or French will see the English metadata.

*Please note that OJS does not currently support the side-by-side display of bilingual metadata.*

If you enable the UI for multiple languages, it is recommended that you translate the text in the About section of your website (see Editorial Team and Other Important Information, below) into those languages as well.
Finally, select a Primary locale to be the default language for your OJS website. This will be the language in which your website will first load for external viewers and in which metadata will be recorded without any user intervention.

Journal Title, Publisher, and ISSN

While Érudit does not harvest your journal’s title-level metadata directly from your OJS (it is set up in our systems when your journal is first added to the erudit.org platform), it is highly recommended that you properly configure your OJS with this information.

To access the title-level metadata for your journal, go to Settings > Journal > Masthead.

- Ensure that your Journal title, Publisher, and ISSN are correctly entered in OJS. They should match the information recorded with ISSN Canada. You can access your journal’s ISSN record on the ISSN Portal.
  - Communicate any changes to the journal’s ISSN record to ISSN Canada and to Érudit.
  - Typically, a change to a journal’s title results in a new ISSN being assigned to the journal.
  - If your journal has a print ISSN, enter it in OJS, even if it is inactive.
- Ensure that title-level metadata is recorded in the appropriate language-specific fields (never put English metadata in a French-language field or French metadata in an English-language field).
- If you provide translated title-level metadata, ensure that it is captured separately in OJS (never put English and French metadata in the same field).
- Use the About the Journal field (see Editorial Team and Other Important Information, below) to list the journal’s previous titles, publishers, and/or ISSNs, as well as the period of coverage for print and/or digital formats.

Editorial Team and Other Information

OJS allows you to record various important information about your journal and make it available on your OJS website. While Érudit does not harvest this information directly from your OJS, some of it is required while the rest is recommended.

To access this additional information for your journal, Settings > Journal > Masthead > Key Information.

It is required that you list your Editorial team, including each member’s institutional affiliation and role with the journal, and keep this information up to date.
It is recommended that you use the Journal Summary and/or About the Journal fields to provide additional information applicable to your journal, such as:

- Aims and scope
- Access policy (open access, subscriptions)
- History of the journal, including previous titles, publishers, formats, and/or ISSNs
- Peer review process
- Author guidelines
- Copyright policy
- Creative Commons license
- Author fees (whether you do or do not charge them)
- Contact information, including the name of a contact person and email address

These fields allow you to present your text as you wish, with line breaks, bold, italic, links, lists, etc.

As with other fields in OJS, it is recommended that you:

- Ensure that journal information is recorded in the appropriate language-specific fields (never put English text in a French-language field or French text in an English-language field).
- If you provide translations of your journal information, ensure that it is captured separately in OJS (never put English and French text in the same field).

Sections

It is important to properly configure your journal’s sections because section information will be included in each article’s metadata.

To access your journal’s sections, go to Settings > Journal > Sections.

In OJS, journal sections serve two purposes:

1. To group articles under a single heading in the table of contents of an issue.
2. To associate articles with an article type (ex: editorial, article, review, etc.). This information is recorded in the article’s metadata.

It is required that you:

- Ensure that each Section Title is recorded in the appropriate language-specific fields (never put an English section title in a French-language field or French section title in an English-language field).
- If you provide translations of your section titles, ensure that they are captured separately in OJS (never put English and French section titles in the same field).
- Complete the Identify items published in this section as a(n) field. Any text may be entered in this field, but we strongly recommend that you use one of the JATS article
types: [https://jats.nlm.nih.gov/archiving/tag-library/1.1/attribute/article-type.html](https://jats.nlm.nih.gov/archiving/tag-library/1.1/attribute/article-type.html). Please use the “research-article” type only for sections with peer reviewed articles. If none of the JATS types are suitable for your section, “Other” is acceptable.

It is **recommended** that you:

- Choose sufficiently generic section titles that may be reused from issue to issue (ex: Editorial, Articles, Reviews, etc.)
  - Avoid creating sections that will be used for only one issue.
- Make use of the **Section Options** as appropriate for each section:
  - Select **Will not be peer-reviewed** for sections where none of the articles are peer-reviewed.
  - Select **Do not require abstracts** for sections where some or most articles will not have abstracts (ex: book reviews) - this will help prevent placeholder abstracts being added to the article metadata.
  - If you create a section that will be used for only one issue, you may wish to select **Items can only be submitted by Editors and Section Editors** - this will hide the section from authors during the submission process.
  - Select **Omit author names for section items from issues’ table of contents** for sections where none of the articles have an author (ex: front matter, back matter, job postings, etc.). Please note that author names will still be found in the articles’ metadata.
- Do not create sections for a stage of your publication process (ex: Forthcoming, Pre-Publication). Please contact Érudit to discuss other ways to make articles available when they are ready to be published.

### Enable Keywords and References

Keywords and references are article metadata elements that are **required, if applicable** to your journal. However, OJS does not collect them by default and some settings must be enabled in order for keywords and references to be added to article metadata.

To enable keywords and references, go to **Settings > Workflow > Submission > Metadata**.

Select **Enable keywords metadata** to permit the addition of keywords to article metadata.

Select **Enable references metadata** to permit the addition of references to article metadata.

You may also choose whether you will allow authors to include these metadata elements during the submission process.
- Do not request… will be selected by default. However, you will need to add this metadata to applicable articles prior to publication.
- Ask the author… will allow authors to add this metadata to applicable articles during submission. However, you will need to review this metadata prior to publication.
- It is not recommended to select Require the author…, as this will force every author to add these metadata elements during the submission process, even if their article does not have them - this will cause the creation of placeholder metadata.

For all points related to an article’s keywords and references, see Article Metadata - Keywords and Article Metadata - References, below.

Copyright and License

It is important to properly configure your journal’s copyright and license in OJS because this information will be included in each article’s metadata. It is possible to customize the copyright or license of an article when necessary (see Article Metadata - Copyright and License, below).

To access your journal’s copyright and license settings, go to Settings > Distribution > License.

All journals are required to:
- Select an option under Copyright Holder to indicate who holds the copyright to the articles published in the journal - the Author, the Journal, or another organization. If the copyright is held by another organization, such as the journal’s publisher, select Custom copyright statement.
- Select how the default Copyright Year is determined for articles. If you publish on an ongoing basis (as each article becomes ready for publication, instead of in full issues), select Use the article’s publication date. Otherwise, select Use the issue’s publication date.

A License is required, if applicable - if your journal uses a Creative Commons license, you must select it here.

In regards to copyright and licenses, it is highly recommended to:
- Ensure that your journal’s copyright and license information is the same wherever it is mentioned - in your PDFs, on your website (About the Journal page, footer, author guidelines, etc), in your author agreement, etc.
- Use a Creative Commons license if your journal wishes to grant certain permissions for public use. (For more information on Creative Commons licenses, see Érudit’s research note on the subject)
- Use the most recent version of Creative Commons licenses (4.0), the default in OJS.
If necessary, select Other license URL to link to an earlier version of a Creative Commons license.

For all points related to an article’s copyright and license, see Article Metadata - Copyright and License, below.

**Issue Metadata**

Once your OJS settings are configured, you can turn your attention to the metadata of your publications - i.e. your issues and articles. Let’s look at issue metadata first.

To access issue-level metadata in OJS, go to Issues > Future Issues (or Back Issues) > Edit > Issue Data.

You will see here fields for Volume, Number, Year, and Title, and checkboxes below them. These checkboxes determine which fields will be captured in the issue’s metadata and displayed on your journal’s OJS website.

Érudit requires you to use the Volume, Number, and Year fields, as appropriate to your journal, and check the checkboxes for all completed fields.

Many journals routinely uncheck the boxes for Volume, Number, and Year and write out the issue’s metadata as a single string in the issue Title field. However, this approach is not acceptable (see Issue Title, below).
Following this requirement means that issue metadata will display on your journal’s OJS website using OJS’s default rendering: Vol. X No. Y (Year): Title (if all fields have been completed).

It is **highly recommended** that your journal follow a consistent structure for identifying its issues, whether with a volume and number (Vol. X No. Y), only a volume (Vol. X), or only a number (No. Y). If your journal changes how it routinely identifies its issues (ex: changing from volume and numbers to just volumes), please advise Érudit.

It is also **recommended** that you enter and display issue metadata consistently for all of your journal’s issues, such that the Archives listing on your OJS website is consistent.

It is **not recommended** that you create issues for a stage of your publication process (ex: Forthcoming, Pre-Publication). Please contact Érudit to discuss other ways to make articles available when they become ready for publication.

**Volume and/or Number**

This metadata element is **required** for all issues.

- Always ensure to enter the **Volume** and/or **Number** of each issue (every issue must have either a volume or a number assigned to it).
- Always ensure that the checkbox for **Volume** and/or **Number** is checked.
  - If your journal assigns only volume numbers to its issues, uncheck the **Number** checkbox.
  - If your journal assigns only numbers to its issues, uncheck the **Volume** checkbox.

**Year**

This metadata element is **required** for all issues.

- Always ensure to enter the **Year** associated with the issue (this may be different from the year in which the issue was published).
- Always ensure that the checkbox for **Year** is checked.

Many indexers will compare the year associated with the issue (sometimes called the volume year) with the year in which the issue was published (sometimes called the publication year). It is **strongly recommended** that you demonstrate that your journal is staying up to date with its publication schedule by keeping the volume year and publication year in sync. However, it is **not recommended** that you skip volume years for this purpose. Please contact Érudit to discuss other ways to remedy a publication delay.
**Issue Title**

This metadata element is *required, if applicable* - you should only supply an issue title for special issues with thematic titles.

The intention for the issue *Title* field in OJS is as a special issue title or as something other than the issue volume, number, and year.

- Ensure that the checkbox for *Title* is checked if the issue *Title* field has been completed.
  - If the issue does not have a thematic title, uncheck the *Title* checkbox.
- Always ensure that the issue title recorded in OJS and in the issue’s PDFs is exactly the same.
- Always ensure that the issue title is recorded in the appropriate language-specific field (never put an English issue title in a French-language field or a French issue title in an English-language field).
- If you provide a translation of the issue title, always ensure that it is captured separately in OJS (never put the English and French issue title in the same field).
- Do not enter placeholder issue titles (ex: journal’s title, Regular Issue) - if there is no thematic title associated with the issue, leave this field empty in OJS.
- Do not use the issue *Title* field in OJS for any metadata element other than the thematic title of a special issue (ex: journal’s title, issue’s volume, number or year, etc.).

**Cover Image**

This metadata element is *required, if applicable* - if you regularly produce cover images for your issues, ensure that you upload them to OJS. Cover images are *recommended* for all journals to maximize their visibility and promotion on Érudit.

Files can be uploaded in the *Cover image* field.

- Images should be formatted as .jpg files.
- Images should include the front cover only (do not include the spine or back cover).
- Images should not include crop marks.
- Image credit and/or caption can be recorded in the *Description* field.

**Other Issue Metadata: The Description Field**

There are some other metadata elements that are *required, if applicable*, but that currently do not have dedicated fields in OJS - this information can be provided in the issue *Description* field.
Seasons are required, if applicable - if you regularly assign seasons (ex: Spring, Fall/Winter) to your issues, ensure that you enter this metadata in OJS.

Guest editors are required, if applicable - if an issue has a guest editor, ensure that you enter this in OJS.

- Always ensure that the metadata in OJS and in the issue’s PDFs is exactly the same.
- The issue Description field in OJS may also be used for a short text that describes the issue generally, such as those that might be found on the back cover of a book. If you provide such a text:
  - Ensure that season and/or guest editor metadata is easily identifiable, such as on its own line;
  - Follow rules for bilingual metadata detailed elsewhere in this guide (i.e. use language specific-fields, do not combine English and French in one field).

Article Metadata

Article metadata poses the greatest challenge for quality control both because of its volume and because it is often added to OJS by an author during the initial submission of the article. However, article metadata such as title, abstract, and keywords are often revised during the editorial process.

For this reason, at Érudit we use your PDFs as the reference for our metadata quality control. An article’s PDF was likely reviewed by a member of your team and the author(s) as the final version was being prepared for publication; whereas the metadata entered in OJS may not have been edited following the article’s review or production and/or it may not have been reviewed at all.

Therefore, it is highly recommended that you adopt a process to review article metadata prior to publication, following the guidelines outlined below.

Article Title

This metadata element is required for all articles.

To access an article’s Title field, select the submission then go to View Submission > Publication > Title & Abstract.

OJS has three fields for an article’s title: Prefix, Title, and Subtitle. You may enter the full title in just the Title field, or divide it among all three; however, it is recommended that you do so consistently within each issue.
• If using all three fields:
  ○ Do not repeat any part of the title in more than one field;
  ○ Do not enter a colon (:) at the end of the Title field if also using the Subtitle field.

• Always ensure that the article title recorded in OJS and in the PDF is exactly the same.
• Always ensure that the article title is recorded in the appropriate language-specific field (never put an English title in a French-language field or a French title in an English-language field).
• If you provide a translation of the article title, always ensure that it is captured separately in OJS (never put the English and French article title in the same field).
• If you provide a translation of the article title, always ensure that it is present in both OJS and the PDF.
• For book reviews, do not include any information other than the title of the review in OJS (ex: Review of, Book Review, etc.).
• Do not use the Title fields in OJS for any metadata element other than an article's title (ex: DOI, article type, etc.).

Article title is one of a small number of metadata elements that Érudit has deemed highly important, therefore Érudit will inform you of any corrections made by our production team and recommend that you make the same corrections in OJS.

Abstract

This metadata element is required, if applicable - you only need to include abstract metadata in OJS for articles that have abstracts. Research articles typically have abstracts, while they are usually not necessary for other types of articles (editorials, books reviews, etc.).

To access an article's Abstract field, select the submission then go to View Submission > Publication > Title & Abstract.

• Always ensure that the abstract recorded in OJS and in the PDF is exactly the same.
• Always ensure that the article abstract is recorded in the appropriate language-specific field (never put an English abstract in a French-language field or a French abstract in an English-language field).
• If you provide a translation of the abstract, always ensure that it is captured separately in OJS (never put the English and French abstract in the same field).
• If you provide a translation of the abstract, always ensure that it is present in both OJS and the PDF.
• Always remove placeholder abstracts (ex: N/A, None, A book review of...) - if there is no abstract associated with the article, leave this field empty in OJS.
If placeholder abstracts are often present in OJS, this is likely because the section is configured to require abstracts for submissions (see Journal Settings - Sections, above).

- Do not preface the abstract with “Abstract” or “Résumé” in OJS - a heading will automatically display on OJS if the Abstract field is completed.
- Avoid copying hidden line breaks or formatting from the PDF or from the word processing file:
  - Always paste without formatting (Ctrl+Shift+V for Windows, Option+Command+Shift+V for Mac) and delete any line breaks.
- Do not use the Abstract field in OJS for any metadata element other than an article’s abstract (ex: keywords, author biography, etc.).

Author Name

For Érudit, this metadata element is required, if applicable - however, OJS requires that every article has an author (see details below).

To access an author’s Name fields, select the submission then go to View Submission > Publication > Contributors, then Edit the author’s profile.

In OJS, all articles are required to be associated with an author’s user profile - in instances where you are forced to create an author for an article that genuinely does not have one (ex: an anonymously signed article, front/back matter, job postings, etc), do not include an author name in the PDF and consider assigning the article to a section that is configured to not display author names (see Journal Setting - Sections, above).

Likewise, OJS does not currently allow for corporate authors (ex: the journal’s editorial board, an organization, or a government agency), in which case include the corporate author name in the PDF and consider assigning the article to a section that is configured to not display author names (see Journal Setting - Sections, above).

Otherwise:

- Always ensure that the author name in OJS and in the PDF is exactly the same.
- Always use the Given Name (i.e. first name) and Family Name (i.e. last name) fields.
- Also use the Preferred Public Name field for authors whose names do not conform to the first-name last-name format (available only in OJS 3.2 and later) and ensure this name is also used in the PDF.
- For book reviews, include only the name of the author of the review, not the author of the reviewed work (the author of the reviewed work can be appropriately acknowledged in the
article title, ex: “Title of Reviewed Work, by Author of Reviewed Work” or “Last Name, First Name of Author of Reviewed Work. Title of Reviewed Work”).

- For interviews, include only the name of the author of the interview (i.e. the interviewer), not the person who is interviewed (i.e. interviewee) (the interviewee can be appropriately acknowledged in the article title, ex: “Title of Interview: An Interview with Interviewee Name”).

- Do not use the name fields in OJS for any metadata element other than an author’s name (ex: contributor role, title [Dr., Ms., Mr.] post-nominal initials [PhD], preferred pronouns, etc.).
  - Additional information about the author may be conveyed in a biographical note in the PDF and the Bio Statement field in OJS. (Please note that biographical notes are not harvested by Érudit.)

**Author name is one of a small number of metadata elements that Érudit has deemed highly important, therefore Érudit will inform you of significant corrections made by our production team and recommend that you make the same corrections in OJS as well.**

**Author Affiliation**

This metadata element is **required, if applicable** - authors that are affiliated with an institution or organization should always have affiliation metadata in OJS.

To access an author’s Affiliation field, select the submission then go to View Submission > Publication > Contributors, then Edit the author’s profile.

- Always ensure that the author affiliation in OJS and in the PDF is exactly the same.
- Always remove placeholder affiliations (ex: N/A, None, etc.) - if there is no affiliation associated with the contributor, leave this field empty in the contributor profile.
- Do not use the Affiliation field for longer, more detailed biographical notes.
  - Additional information about the author may be conveyed in a biographical note in the PDF and the Bio Statement field in OJS. (Please note that biographical notes are not harvested by Érudit.)

**Author Email**

For Érudit, this metadata element is **required, if applicable** - however, OJS requires that every author has an email (see details below).

To access an author’s Email field, select the submission then go to View Submission > Publication > Contributors, then Edit the author’s profile.
In OJS, authors are linked to a user profile, therefore OJS requires that every contributor has an email address - in instances where you are forced to create an email address for an author who genuinely does not have one (ex: a deceased author), use none@example.com, and do not include an email in the PDF.

Otherwise:

- Always ensure that the author’s email in OJS and in the PDF is exactly the same.

**Keywords**

This metadata element is required, if applicable - articles with keywords are required to have keyword metadata in OJS.

To access an article’s Keywords field, select the submission then go to View Submission > Publication > Metadata (available if OJS has been properly configured; see Journal Settings - Enable Keywords or References, above).

In order to enter keywords correctly in OJS, press “Enter” after each keyword.

- Always ensure that the keywords recorded in OJS and in the PDF are exactly the same.
- Always ensure that keywords are recorded in the appropriate language-specific field (never put English keywords in a French-language field or French keywords in an English-language field).
- If you provide translated keywords, always ensure that they are captured separately in OJS (never put English and French keywords in the same field).
- If you provide translated keywords, always ensure that they are present in both OJS and the PDF.
- Always remove placeholder keywords (ex: N/A, None, etc.) - if there are no keywords associated with the article, leave this field empty in OJS.
- Do not preface the keywords with “Keywords:” in OJS - a heading will automatically display on OJS if the Keywords field is completed.
- Do not use the Keywords field in OJS for any metadata element other than an article’s keywords (ex: article type, author name, etc.).

**References**

This metadata element is required, if applicable - you only need to provide reference metadata if you are using OJS version 3.2 or higher, and then only for articles that have bibliographies.
To access an article’s References field, select the submission then go to View Submission > Publication > References (available if OJS has been properly configured; see Journal Settings - Enable Keywords or References, above).

- Always ensure that the references recorded in OJS and in the PDF are exactly the same.
- Only include bibliographies (i.e. the list of works cited at the end of the article) in OJS. Do not include endnotes, footnotes, or lists of additional resources not cited in the article (ex: Further Reading). If the article does not have a bibliography, leave this field empty in OJS.
- Always separate references in OJS with one reference per line.
- Do not preface the references in OJS with a subtitle (ex: Bibliography, References, Works Cited, etc.) - a heading will automatically display on OJS if the References field is completed.
- Do not add any text between references (ex: subheadings).
- Format references as plain text in OJS - do not include HTML or XML formatting tags, such as italics (<i></i>).
- Avoid copying hidden line breaks or formatting from the PDF or from the word processing file:
  - Always paste without formatting (Ctrl+Shift+V for Windows, Option+Command+Shift+V for Mac) and delete any extra line breaks.
- Do not format the references in OJS in the form of a list with numbers or bullet points preceding each reference.
- Always ensure that each reference in OJS contains the name of the cited work’s author (when several works by the same author are cited, do not replace the author’s name with a dash).
- 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.
- Do not use the References field in OJS for any metadata element other than an article’s references (ex: keywords, author biographies, etc.).

Digital Object Identifiers (DOIs)

This metadata element is required, if applicable - you only need to include DOIs in your OJS if you do not receive them from Érudit.

To access an article’s DOI field, select the submission then go to View Submission > Publication > Identifiers (available if the DOI plugin has been enabled and properly configured in your journal).

If your OJS has been configured to automatically assign and deposit DOIs, then you should never need to modify an article’s DOI. In this case, we recommend the following:
• Ensure that all DOIs have been successfully deposited by checking Tools > Import/Export > Crossref XML Export Plugin the day after publication to verify that the status of all DOIs have changed from “Not deposited” to “Active;”
• If you update the metadata of a submission post-publication, ensure that you deposit it again using the Crossref XML Export Plugin (possible in OJS 3.1.2 or later);
• If setting up DOIs in OJS for the first time, use the default pattern setting in OJS’s DOI Plugin, since DOIs do not need to be (and are actively discouraged from being) human readable - they are not meant to be custom URLs.

If you copy your DOIs into OJS, we recommend the following:
• Ensure that all DOIs successfully resolve to the appropriate article (perhaps on another platform) by clicking on the DOI on the article’s OJS landing page after publication.

DOI is one of a small number of metadata elements that Érudit has deemed highly important, therefore Érudit will inform you of any problems encountered by our production team and recommend that you take steps to remedy them.

PDFs
A PDF is required for all articles.

To access an article’s PDF, select the submission then go to View Submission > Publication > Galleys.

• All PDFs must include embedded fonts (see Érudit’s guide on embedding fonts).
• PDFs must not include crop marks, blank pages, or advertisements.
• All pages of the PDF should be rotated in the direction of reading - for any page where all the text, images and/or figures run horizontally across the page, that page should be rotated horizontally, with the rest of the pages remaining vertical.
• While OJS allows multiple PDF galleys per article, journals on Érudit should publish only one PDF galley per article.
  o It is recommended that additional material that would form a separate PDF galley should either be included in the same PDF as the main article (recommended for appendices, figures, etc.) or published as a separate article on OJS (recommended for translations, responses to an article, etc.)
• It is recommended that you select a language for the PDF (and for all galleys) that corresponds to the main language of the article.
PDF is one of a small number of metadata elements that Érudit has deemed highly important, therefore Érudit will inform you of any significant problems encountered by our production team and request that you take steps to remedy them.

Copyright and License

Copyright metadata is required for all articles. License metadata is required, if applicable - you only need to provide license metadata if your journal uses Creative Commons licensing.

To access an article’s Copyright Holder, Copyright Year (and License, if applicable) fields, select the submission then go to View Submission > Publication > Permissions & Disclosure.

OJS will pre-populate the article’s metadata with the copyright (and license, if applicable) configured for your journal (see Journal Settings - Copyright and License, above). If an article is to be published with a copyright or license different from what is configured for your journal, it is possible to edit the copyright or license for that article prior to publication.

- Always ensure that the copyright/license recorded in OJS and in the PDF is exactly the same, including copyright year.

Pagination

This metadata element is required for all articles.

To access an article’s Pages field, select the submission then go to View Submission > Publication > Issue.

- Always ensure that the pagination recorded in OJS and in the PDF is exactly the same.
- Always enter pagination metadata in OJS, even if all articles begin with page 1.
- Do not change an article’s pagination post-publication unless correcting an error.
- Record pagination in OJS in the format XX-YY, where XX is the first page and YY is the last page (ex: 45-72).
  - First and last page must be separated by a hyphen (-), and not by en dash (–) or em dash (—).
Top 10 Tips
for Quality Metadata

➔ Make sure that OJS’s settings are properly configured for languages, sections, keywords, references, copyright, and license.

➔ Always review metadata prior to publication.

➔ Make sure that all metadata in OJS and PDFs is exactly the same.

➔ Make sure that all metadata included in PDFs is present in OJS, and vice versa.

➔ Never put English metadata in a French-language field, or vice versa.

➔ Never put English and French metadata in the same field.

➔ Never use an OJS field for anything other than the metadata element it is intended to capture.

➔ Never use placeholder text (N/A, None, etc.) in an OJS field - just leave it empty instead.

➔ Never preface an OJS field with a heading (Abstract, Bibliography, etc.) - OJS automatically displays headings for relevant metadata.

➔ Avoid copying longer metadata (abstracts, references, etc.) into OJS directly from a PDF or word processor—first strip formatting and delete any extra line breaks.