OJS Manual
Setting up and Running a Journal in OJS
OJS Manual

Last update: 24.11.2023

The subsequent outline follows the menu items of the OJS publication software. Part 1 covers the setup of a new journal, part 2 deals with the operation of a journal (management of submissions etc.). The outline is to be understood as a suggestion in which order the setup of a journal can be carried out. However, it does not necessarily have to be followed.

Please note that this manual is based on OJS version 3.3.0-14. Possible new features from version updates are added periodically, but possibly with a time delay. Differences between the OJS installation as you see it in your browser and the figures in the manual are possible. The screenshots follow an OJS instance for which English has been selected as the main language. Additional help and information can be found under “help” buttons in OJS.

Further information and downloadable material on publishing journals with TUM.University Press can be found here.

If you have any further questions, please do not hesitate to contact us by e-mail: tumuniversitytypress@tum.de.

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1. Setting up a new journal

1.1. Login

After you have submitted the OJS data form to TUM.UP, all indicated persons receive their personal login by e-mail. You can then log in with your data via the OJS start page of TUM university library:

https://journals.ub.tum.de/index.php/sj

1.2. Journalsettings

Under Settings you find the basic settings that you need to configure for your journal:

First click on Journal to enter the journal settings.
1.2.1. Masthead

You will automatically be directed to the first tab of the journal settings: the Masthead. A lot of information is already pre-entered by TUM.UP. You can change this information here.

Scroll down further, and you will find the Publishing Details. These are also pre-registered by TUM.University Press and may not be changed.
Scroll down further to get to the **Key Information** section.

You have already provided us with the **Journal Summary** on the OJS data sheet and it will be filled in by TUM.UP. You can change it here.

Recommendation: max. 150 words.

Here you can enter the **Editorial Team** of your journal.

Scroll down further to get to the **Description** section.

For some items listed under **Description** (e. g. copyright notice, privacy statement) there are also additional fields to be filled in later.

**We therefore recommend to fill out the description section only at the end of the setup of a new journal.**

Then it is clear which information has already been entered in other places and which you would like to integrate.

Press **Save** at the end to save changes.
1.2.2. Contact

Enter the information about the main contact person here.

Enter here the information about the contact person who can be approached in case of technical questions.

Press **Save** at the end to save changes.
1.2.3. Sections

Under the item **Sections** you can change the sections.

Click *Edit* to change an existing section

If you want to add a new section, select **Create Section**:  

1.2.4. Categories

Here you can set up thematic categories that can be selected by the authors when submitting and are thus visible on the article page. Articles can be sorted by categories.

If you want to add a new section, select **Add Category**:  

With **Add Category** a pop-up window opens, which asks for the following information:

For the **Path**, ideally choose the name of the category as the title. The path may only consist of letters and numbers, spaces cannot be used.

Further details are:

The **Cover Image** here refers to the individual category only. You can upload the cover for the entire journal at the individual journal issues.

Save all changes with **OK** at the bottom of the page.

### 1.3. Website

In the next step, the website settings can be configured. To do this, click **Website** under **Settings** in the control menu.
1.3.1. Appearance

The first tab Appearance under the Website menu area covers the appearance of your website if you want to set it up automatically with OJS.

You have three areas in which you can configure settings.

1. Theme

Under Theme you can define the basic design of the Journal website. All currently available free themes are pre-installed.

You can find sample pages and more information about each theme on the Public Knowledge Projects.

Use the Typography section to select a font combination that you want to use for the website.

Selection of a color for the Website header.

The Journal Summary does not automatically appear on the website. You can activate it here.

In the next step you can upload a homepage image. This can serve as the background of the header.

Press Save at the end to save changes.
2. Setup (for the Appearance Section)

In the next step you can define important components of the website under Setup.

A first section includes image files that you can store here:

- **Here you can upload a Journal Logo.**

- **The Journal Thumbnail** is a small image that can be displayed in journal entries.

- **The Homepage Image** of the journal is displayed centrally on the website.

- **In the Page Footer** you can integrate images, text or HTML code to be displayed at the bottom of the website. The TUM logo and a link to TUM.UP are already preset by the editors of TUM.UP and may not be changed. Additional text or further image material can be integrated.
In the **Sidebar** section you can define which elements should be integrated on the right column of your website. For some elements, the corresponding plugin (see 1.3.3. Plugins for an explanation) must first be activated for them to be visible.

By checking the box, a sidebar element will be integrated into your website:

You can change the order of the sidebar elements using the control arrows on the right. Alternatively, you can move sidebar elements by dragging and dropping them to the desired position.

Press **Save** at the end to save changes.
3. Advanced

In the Advanced section you will find the following functions:

- **Under Journal style sheet** you can store style sheet information for authors as a css-file.

- **A Favicon** is an ICON that web browsers use to label a website (displayed in the tab at the top left).

- **Additional content that cannot find a place in any other location can be integrated under Additional Content.**

- Press **Save** at the end to save changes.
1.3.2. Setup

In the section **Setup** you can adjust many other basic settings.

1. **Information**

![Image of setup section](image)

Here you can add short descriptions of the journal for readers. These will be visible in the **sidebar** ("Information block" must be added to the sidebar first); cf. 2. Setup (for the Appearance section)

![Image of information block](image)

Here you can add short descriptions of the journal for librarians. These will be visible in the **sidebar** ("Information block" must be added to the sidebar first).

![Image of information block](image)

Press **Save** at the end to save changes.
2. Languages

Under **Languages** you can set the language settings for the website.

**Primary locale**: indicates the language of the website.

**UI (User Interface)**: indicates the language in which OJS is available after login. Must be selected by users themselves.

**Forms**: In which languages are the forms available? Selection can be made by users.

**Submission**: In which languages can a submission be made? Users select the relevant language when submitting.

Saving is done automatically.
3. Navigation

In the **Navigation** section, you can set the navigation that is visible on the website. Default settings have already been made, which you can leave as they are - or customize as required.

The **Primary Navigation Menu** includes all navigation fields that are visible without login.

Under **Edit** you can also change the navigation menus.

**Assigned Menu Items** are website components that are assigned to a specific group of people (e.g. users).

**Unassigned Menu Items** are generally accessible.
If you scroll further down, you will find a list of existing navigation menu items. You can also add additional items.

4. Announcements

In the Announcements section you can activate the option to display announcements on the website.

Press Save at the end to save changes.
5. Lists

Under **Lists** you can set limits for the number of items in different list types on the website. The default is 25 items (submissions, users, ...) and 10 links per page.

6. Privacy Statement

This statement is displayed on the website, during user registration and when submitting a contribution. You use it to specify how you handle user data. An example text is already preset in OJS.
7. Date & Time

In this section you can find different styles for specifying date and time (short and long versions). Choose the formats that suit you best.

Press **Save** at the end to save changes.
1.3.3. Plugins

Under **Installed Plugins** you can find a list of plugins installed for your journal. For your journal a large amount of available plugins are activated by the TUM.UP team from the beginning. However, you can also activate additional plugins if you would like to integrate the corresponding functions into your website. You can find a list with explanations of the functions of each plugin here: https://openjournalsystems.com/ojs-2-user-guide/generic-plugins/.

If you want to activate any other plugins, place a check mark in the **Enabled** column of each plugin.

For some plugins, the check mark in the **Enabled** column is grayed out. In these cases the plugin cannot be disabled.
Once a plugin is installed, you will be redirected to **Installed Plugins** and can activate it there. The TUM.UP team will take care of updating the plugins.

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### Plugin Gallery

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hypothesis</td>
<td>This plugin integrates the Hypothesis annotation tool into articles.</td>
<td>Up to date</td>
</tr>
<tr>
<td>Shibboleth</td>
<td>This plugin adds Shibboleth support.</td>
<td>Up to date</td>
</tr>
<tr>
<td><strong>Backup</strong></td>
<td>This plugin permits backups to be downloaded from within OJS.</td>
<td></td>
</tr>
<tr>
<td><strong>Thenticate</strong></td>
<td>This plugin permits automatic submission of uploaded content to the Thenticate service for plagiarism checking.</td>
<td></td>
</tr>
</tbody>
</table>

---

If you want to install an additional plugin, you can open it by clicking on its name and click on **Install**.

---

Once 'Up to date' is marked under **Status**, this plugin is already installed.
1.3.4. Static Pages

Under Static Pages, content can be added for which there is otherwise no setting in OJS and which does not change frequently. (e. g. imprint, privacy policy etc.). This tab is only visible if the “Static Page Plugin” is activated.

A pop-up window will open:

- **Path**: Static URL address
- **Title**: name of the page
- **Content**: content of the page

Press **Save** at the end to save changes.
1.4. Workflow
Here you can configure the settings that structure the workflow for submission.

1.4.1. Submission

1. Disable Submissions

At this point you can disable the option to submit contributions.

Press **Save** at the end to save changes.
2. **Author Guidance**

Here you can fill in the guidelines that will be displayed to contributors when submitting contributions. You can enter the following information here:

- a brief outline of the submission process
- a checklist containing the conditions for submission that contributors must confirm
- an outline of the files that are to be uploaded
- an outline of the information contributors should provide about themselves
- a text that precedes the form for submitting the title, abstract and other key information
- a text that precedes the form for entering metadata and comments for the editors
- a text that is additionally displayed during the last step of the submission process (checking all information)
- A copyright text that must be confirmed by the contributors

Standard texts are already entered in OJS for some of the text modules. You can change these or use them as is. They look as follows:

Press *Save* at the end to save changes.
3. Metadata

Here you can activate the metadata fields, which can be filled in by authors when submitting contributions.

To do this, place a check mark next to the corresponding metadata field.

Press Save at the end to save changes.

4. Article Components

Here you can define possible article components. Contributors classify their submissions based on these article components when submitting them.
If you want to modify existing article components, you can click the arrow next to the article component name and select the **Edit** field.

The following pop-up window opens:

Here you can change the name of article components.

Here you can select specific file types.

Here you can select metadata types.

You can set a short key for the article component here.

Press **Save** at the end to save changes.
If you want to set up a new article component, select **Add Article Component**.

The same pop-up window opens as when changing existing article components (see above).

If you want to change the order of the article components, select **Order**.

You can then use drag and drop to arrange the different article components.

At the end, click **Done** to save your changes or **Cancel Ordering** if you do not want to save your changes.
1.4.2. Review
In this section you can configure the settings for the review process.

1. Setup

The first setting concerns the Review mode. You can choose between three options:

- Double-Blind-Peer-Review
- Single-Blind-Peer-Review
- Open-Peer-Review

If you scroll down further, you can define the access to the file which is to be reviewed:

Access to the file is only possible after the reviewer has agreed to the review.

The reviewers automatically receive a link, with which they can directly access the file.

In the following, you can configure settings for **automated messages** as part of the review process.

You can specify the time frame in which reviewers can agree to the review.

You can specify the time frame in which the review should be delivered.

Press **Save** at the end to save changes.
2. Reviewer Guidance

Under Reviewer Guidance you can provide guidelines/review guidelines for the review process.

In the following field you can define potential conflicts of interest that exclude persons as reviewers.

Press **Save** at the end to save changes.

3. Review Forms

You also have the option of depositing forms for the review process. Reviewers can use these review forms for their reviews.
You can create forms using the **Create Review Form** button.

The following pop-up window opens:

Press *Save* at the end to save changes.

1.4.3. Publisher Library

Under *Publisher Library* you can upload files for download on the website.
Via **Add a file** you can add files.

The following pop-up window opens.

Press **Save** at the end to save changes.
1.4.4. E-Mails

1. Setup

Under **Setup** you can save a signature for emails sent via OJS.

Press **Save** at the end to save changes.

2. Email Templates

Here you can save templates for e-mails that you send via OJS. There are already many templates available, which you can change via **Edit**.

This pop-up window opens.

You can set up more templates under **Add Template**.
1.5. Distribution

1.5.1. Licence

Here you can specify the license terms for contributions.

You can then choose between different licensing models. Please note that TUM.University Press only supports the publication of contributions under the CC-BY and CC-BY-SA licenses.

The next setting specifies the copyright year. Depending on whether you have chosen an issue-based or continuous publication method, you can link the copyright year to the issue or to the individual contribution.
At the end of the license settings you will find a free field for license conditions. The information you enter here will be displayed on the website next to the published article.

Press *Save* at the end to save changes.

### 1.5.2. DOIs (Digital Object Identifier)

Here you can enter the basic settings for assigning DOIs.

- This box is already checked and allows DOIs to be assigned.
- Here you can specify for which items DOIs should be assigned. Ideally, you should assign a DOI for both articles and issues.
- The DOI prefix of the university library is preset. **Do not make any changes here.**
- Here you can select the stage for DOI assignment in the publication process.
- The DOI format is preset. **Do not make any changes here.**

Press *Save* at the end to save changes.
The registration data for the agency through which the university library obtains its DOIs is set under the “Registration” tab. This is preset by TUM.UP - do not make any changes here!

1.5.3. Search Indexing

Here you can optimize your website for Google and other search engines.

Under **Description** you can add a short description (50-300 letters) of your journal, which will be displayed by search engines in the results list.

Under **Custom Tags** you can insert HTML tags that will be displayed on each page. Please use terms that are translated by OJS into HTML tags (e.g. Journal of Library Science).

Press **Save** at the end to save changes.
1.5.4. Payments

Under **Payments**, a subscription fee can be activated. All journals published via TUM.UP are Diamond Open Access journals, i.e. no fees may be charged for reading or publishing them.

1.5.5. Access

Under **Access** you can limit the access to the contributions and metadata. Since TUM.UP supports Diamond-Open-Access, you should make the following settings:

- All contents of the journal are made available in open access.
- The metadata of the articles and of the journal are provided.
- Press **Save** at the end to save changes.
1.5.6. Archiving

Long-term archiving is guaranteed internally at TUM via MediaTUM, therefore further plug-ins are not necessary.

1.6. Users & Roles

Under this menu item, user accounts can be managed or new accounts can be created.

1.6.1. Users

Under this menu item you will find an overview of the users with account for your OJS journal.

When you click the arrow to the left of the **Given Name**, options open for that user’s account.

You can send an e-mail to the respective user, change the stored data (**Edit User**), block access (**Disable**) or delete the user (**Remove**).
You can also create new users under **Add User**:

The following pop-up window opens:

Here you can enter the user name.

Also necessary is an e-mail address.

A password can be inserted or generated automatically and sent by e-mail.

Users can receive a pre-written welcome email (cf.: 1.4.4. E-Mails).

Press **Save** at the end to save changes.

After users have been created, they can be assigned roles under **Edit User**.
1.6.2. Roles

This menu item is used to manage the roles that can be assigned to users. You can select the extent to which the individual roles have access to the different parts of the submission process: For example, editors have access to the entire editing process of a submission, while copyeditors only have access to the copyediting section. When starting to manage the journal, we recommend that you first work with the basic settings. If you notice during the process that you need to make changes to the user roles, do so here.

You can also set up new roles with **Create New Role**.

The following pop-up window opens:

Click **OK** at the end, to save your changes.

You can also edit existing roles.
1.6.3. Site Access Options

In this menu item you can set the options for accessing your page content. All journals published via TUM.UP are Diamond Open Access journals. For this reason, point 1 “Site Access” and point 2 “View Article Content” should not be limited by a user login or other means. However, if this is necessary for your journal, please contact TUM.UP.

Press Save at the end to save changes.
2. Operation of Journals

If you want to change basic settings while the journal is running (e.g. add new users), you can do this at any time as described in 1. Setting up a new Journal. In the following you will find an overview of the workflow for the operation of journals.

2.1. Creating a new issue

If you have decided on an issue-based form of publication, first create a new issue under Issues. If you have opted for a continuous publication format, a new issue is created for each individual article. In this case, you also create a new issue here.

Future Issues lists issues that have not yet been published.

You can create a new issue under Create Issue.

The following pop-up window opens:

Press Save at the end to save changes.

The issue will then appear under Future Issues.

If you want to modify existing issues, you can click the arrow next to the issue and select the Edit field.

Under Preview you can see a preview of the issue without it being published.

Under Publish Issue you can publish the issue.
2.2. Editing and managing contributions

2.2.1. Submitting contributions (authors)

Contributions can be submitted via the website. To do so, contributors must register/create an account with OJS. Alternatively, contributions can also be submitted by journal managers or editors. The user interface is the same in all cases.

Submissions are managed via the menu item **Submissions**.

To submit a contribution, click on **New Submissions**.

You will be redirected to a page where you can enter all important data for the contribution. The page is divided into five sections, whereby you can only access the next section if you have filled in the mandatory fields of the previous one.
1. Start

In this menu field the basic information about the article is entered.

Here it is possible to select from the languages that have been defined under Website Setup for Submissions.

The section policies that have been defined under Journalsettings/Sections appear here.

The basic requirements for a submission appear here as a checklist. These requirements have been defined in advance under Workflow/Submissions/Checklist.

Comments for the editors can be added below.

If you have multiple roles, you still need to specify the role in which you make the submission.

At the end, the privacy agreement must be confirmed.

When all mandatory fields have been filled in, you can continue the submission process under Save and continue.
2. Upload Submission

In the next step, you can upload the contribution or parts of the contribution. Click Add File or Upload File to upload a file.

If you have uploaded a file, you have to define which file type it is. In addition to the suggestions (here: Article Text and Other), you can select under Edit from the file types you have been preset under Workflow/Submission/Article Components.

Once you have uploaded a file, you can continue the submission process under Save and continue.
3. Enter Metadata

In the next step you can enter metadata for the contribution.

This includes basic data such as the **title** and **abstract** of the contribution.

In addition, contributors are asked to enter all the metadata that has been activated in the settings under Workflow/Submission/Metadata. Under "Rights" you can enter the relevant Creative Commons license.

Once you have uploaded a file, you can continue the submission process under **Save and continue**.
4. Confirmation

In the last step the submission is confirmed with Finish Submission.

A pop-up window opens, in which the submission must be confirmed once again.

With OK the submission is finally confirmed.

5. Next Steps

After submitting you will get to a tab where the next possible steps are listed. These differ depending on the role of the user.
2.2.2. Submitted article (editors/journal managers)

After a contribution is submitted, it appears in the dashboard of editors and journal managers. From here, it can be fed into the production workflow. To do this, click on View.

You will now be taken to the overview of the contribution workflow. You can send the contribution for review, accept it without review or reject it.

You can arrange discussions with other added collaborators via OJS. This is possible in every workflow step.

You can add collaborators (reviewer, copyeditor, etc.) in the further process. This is possible in every workflow step. To add people, they must be created or be created as users.
2.2.3. Review

1. Journal Manager

In the workflow overview, you can send a contribution to review (Send to Review). The following page opens:

Once you have selected the contribution and confirmed it with Send to Review, you will be taken to the review overview page.

You can add reviewers here under Add Reviewer.
First, you select a person from existing users as a reviewer.

An e-mail for the review request is pre-written in this text box, you can modify it as you wish.

Sending of the e-mail can be disabled.

You can set deadlines for the review.

You select the file to be shared for review.

When you save your settings, an email is automatically sent to the reviewer if you have not disabled this feature.
When reviews have been submitted (for the process, cf. 2.2.3.1), this is displayed in the reviewer area.

The full review can be downloaded under **Read Review**. The recommendation is stated under **Review Submitted**.

Reviewers can also start discussions or comment on existing discussions.

Different decisions can be made based on the review.

**Request Revisions**
If you want the contributors to revise the contribution, click **Request Revisions**. The following pop-up window opens:

This information is for contributors.

You can write an email to the contributors or use a template.

The revised manuscript and/or review and other files can be uploaded.

Send email and save by clicking **Record Editorial Decision**.
If a revised paper needs to be reviewed again, a second (even third, fourth, etc.) round of review can be initiated.

The procedure is identical to the first round of review.

⇒ Accept Submission

You can manage the notification of contributors here and write an email text/use a template.

You can attach reviews to the email and share other files with the contributors.

Click Next: Select Files for Copyediting to complete the Reviews step.
Decline Submission

If a submission is rejected without the possibility of revision, you can issue a rejection under **Decline Submission**.

You can manage the notification of contributors here and write an email text/use a template.

You can attach reviews to the email and share other files with the contributors.

Send email and save by clicking **Record Editorial Decision**.

2. Reviewers

Reviewers receive an e-mail with the request to submit a review for a contribution. This email includes the link to the contribution, the deadline, and access to OJS.

Once reviewers have created an account or logged in, the review is listed on the dashboard.

**View** takes you to the review process. In the first step, the reviewers must agree to the review.
In the first step, **Request**, reviewers will find all relevant basic information about the contribution.

When reviewers have agreed to the review, they will be taken to the **Guidelines**. If editors have defined guidelines for the review (**Workflow/Review/Reviewer Guidance**), these are noted here.

**Continue to Step #3** takes reviewers to the next review step: **Download & Review**.
Here reviewers can download the contribution data.

You can leave notes for authors and editors.

You can upload files of your review and start a discussion.

At the end of the review, a recommendation must be made as to whether or not the article should be published (with changes, if necessary).

The review process can be saved temporarily (Save for later) or completed (Submit Review).

The submission of the review must be confirmed once again.
At the end of the review process there is an overview of the review.
2.2.4. Copyediting

After the review, the contributions can be finalized. Copyediting means formal and orthographic editing, where the texts are brought into their final form. In order to get this step started, files can be passed on to copyeditors.

This is done by either uploading a file under Draft Files or selecting from the files submitted in the previous process.

When a copyeditor has revised a file, he/she can upload it under Copyedited.

By clicking on Send to Production, the contribution can be sent to production.

The following pop-up window opens, where you can inform the contributors by e-mail that the contribution is now in production.

The email is sent by clicking Next: Select Files for Production.
The next step is to select the files for production.

By clicking on **Record Editorial Decision**, the article goes into production.

### 2.2.5. Production

In the **Production** section you can upload additional files and start discussions.

Clicking **Schedule for Publication** takes you to the last step of the workflow: The publication.
2.2.6. Publication

Under **Publication** you define the settings for publishing an article. You have the option to preview the website with **Preview**.

1. Title & Abstract

Title and abstract for the website are inserted here.

Press **Save** at the end to save changes.
2. Contributors

The **contributors** who will later be named on the website can be entered here. The persons who were listed as authors of the contribution are already noted here. This list can be finalized at this point.

3. Metadata

Under **Metadata**, the metadata fields that were filled in during submission can be reviewed and finalized.
4. Galleys (= final versions of articles)

If you provide a contribution in other file formats (e.g. XML), you can set this here.
5. Permissions & Disclosure

Here you can formulate the website entry for the contribution copyright. If you do not name a copyright holder, it will automatically be assigned to the journal.

Press Save at the end to save changes.

6. Issue

Under Issue you can assign the contribution to an issue.

You can assign the contribution to an issue using Assign to Issue.

You can also choose a section to which the contribution will be assigned.

A cover image for the contribution can be uploaded here.

You can specify on which pages of the issue the contribution will appear under Pages. You do the side counting yourself.

A URL is automatically created for the contribution. You can also enter an alternative URL if necessary.

The publication date corresponds to the publication date of the issue.

Press Save at the end to save changes.
7. Authors History

Under Authors History you will find an overview with information about the authors.

8. Funding Data

Here you can note if a contribution was funded.

9. Finalization

When all data is entered and the contribution is ready to be published, click Schedule for Publication. Once a contribution has been published, it may no longer be changed. If a revision of the article is made after publication, it must be published under a new DOI.