

Users and Roles

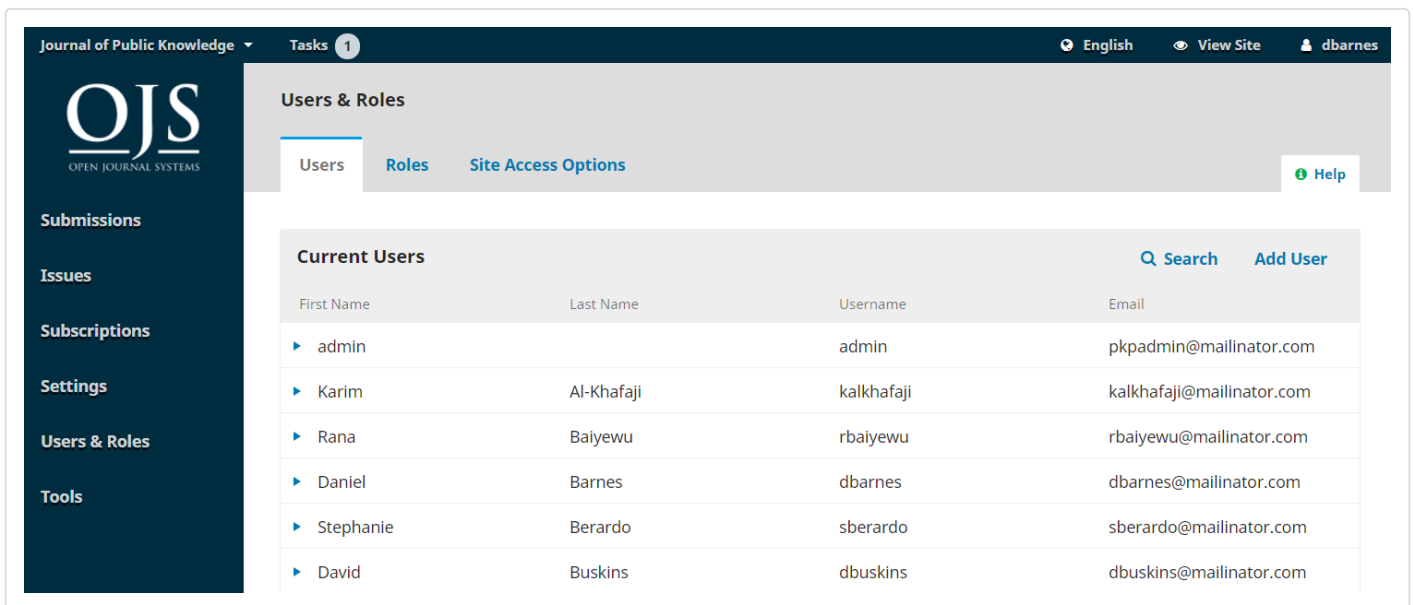
This section provides information on accessing all of user accounts associated with your journal, as well as managing roles and permissions.

Managing Users

This PKP School video explains how to manage users in OJS. To watch other videos in this series, visit [PKP's YouTube channel](#).

In addition to managing the journal web site, the Journal Manager is also responsible for all of the user accounts in the system.

To view the user accounts, select Users & Roles from the left menu.



The screenshot shows the OJS (Open Journal Systems) interface for managing users. The top navigation bar includes 'Journal of Public Knowledge', 'Tasks 1', 'English', 'View Site', and 'dbarnes'. The left sidebar contains a menu with 'Submissions', 'Issues', 'Subscriptions', 'Settings', 'Users & Roles', and 'Tools'. The main content area is titled 'Users & Roles' and has three tabs: 'Users' (selected), 'Roles', and 'Site Access Options'. A 'Help' button is visible in the top right of the main area. Below the tabs is a table titled 'Current Users' with columns for 'First Name', 'Last Name', 'Username', and 'Email'. The table lists six users: admin, Karim Al-Khafaji, Rana Baiyewu, Daniel Barnes, Stephanie Berardo, and David Buskins. There are 'Search' and 'Add User' buttons in the top right of the table area.

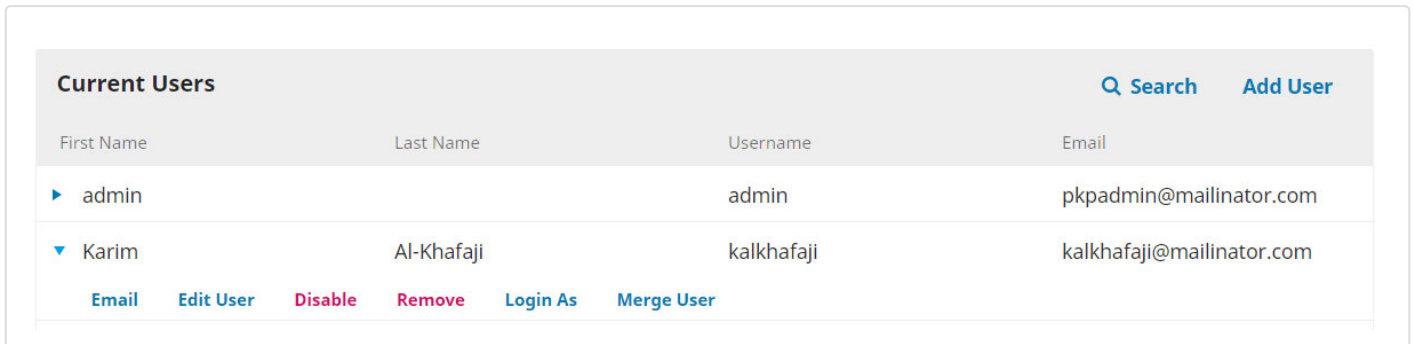
First Name	Last Name	Username	Email
admin		admin	pkpadmin@mailinator.com
Karim	Al-Khafaji	kalkhafaji	kalkhafaji@mailinator.com
Rana	Baiyewu	rbaiyewu	rbaiyewu@mailinator.com
Daniel	Barnes	dbarnes	dbarnes@mailinator.com
Stephanie	Berardo	sberardo	sberardo@mailinator.com
David	Buskins	dbuskins	dbuskins@mailinator.com

If you want to export a list of all registered users, you can find the option to export it as an XML file under the **Tools** menu. If you prefer your user data in a spreadsheet format, you can download it as a CSV file from **Statistics > Users**.

Users

Users are displayed in last name order.

You can edit a user account by selecting the blue arrow to the left of an entry.



Current Users				Search	Add User
First Name	Last Name	Username	Email		
▶ admin		admin	pkpadmin@mailinator.com		
▼ Karim	Al-Khafaji	kalkhafaji	kalkhafaji@mailinator.com		
Email	Edit User	Disable	Remove	Login As	Merge User

This opens the options to Email, Edit User, Disable, Remove, Login As, Merge User.

Email Users

If you want to email a user about a particular submission, you can use the Discussion feature in the submission. This keeps all communication about a submission in one place.

To send an email to a user that is unrelated to a submission:

1. In the Journal Manager or Editor's dashboard, go to Users & Roles > Users
2. Find the user you want to email
3. Click the blue arrow next to the user's name to reveal links below it
4. Click Email. A pop-up box will appear where you can type in your message and send it

Email

Subject *

To
Karim Al-Khafaji <kalkhafaji@mailinator.com>

Body *

Send Email Cancel

* Denotes required field

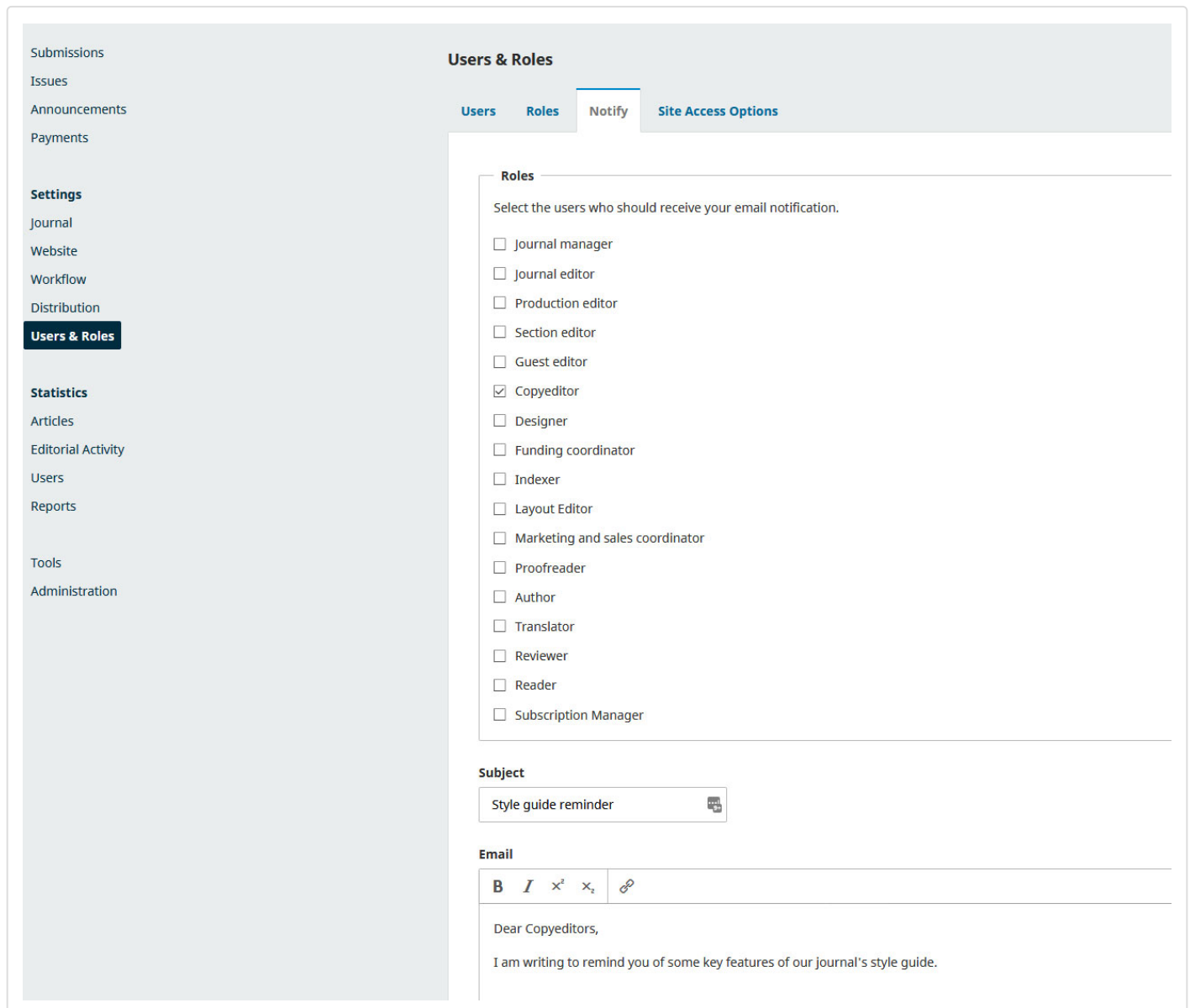
In OJS 3.3 you can email multiple users at the same time using the Notify tab. This feature will need to be enabled for each journal by the journal administrator under Site Settings > Bulk Emails. The site administrator can also disable certain roles in the journal from receiving bulk emails under Hosted Journals > Settings Wizard.

If enabled for the journal by the site administrator, emails can be sent to all users in one or more role, such as all journal managers and / or all section editors, etc.

See [Site Administration > Site Settings](#) for instructions on enabling this feature.

In the Notify tab, select the user roles that you would like to email. Type your subject and email message. You have the option to send a copy of the email to your own

email address. You will receive a status notification indicating that the message was sent successfully.



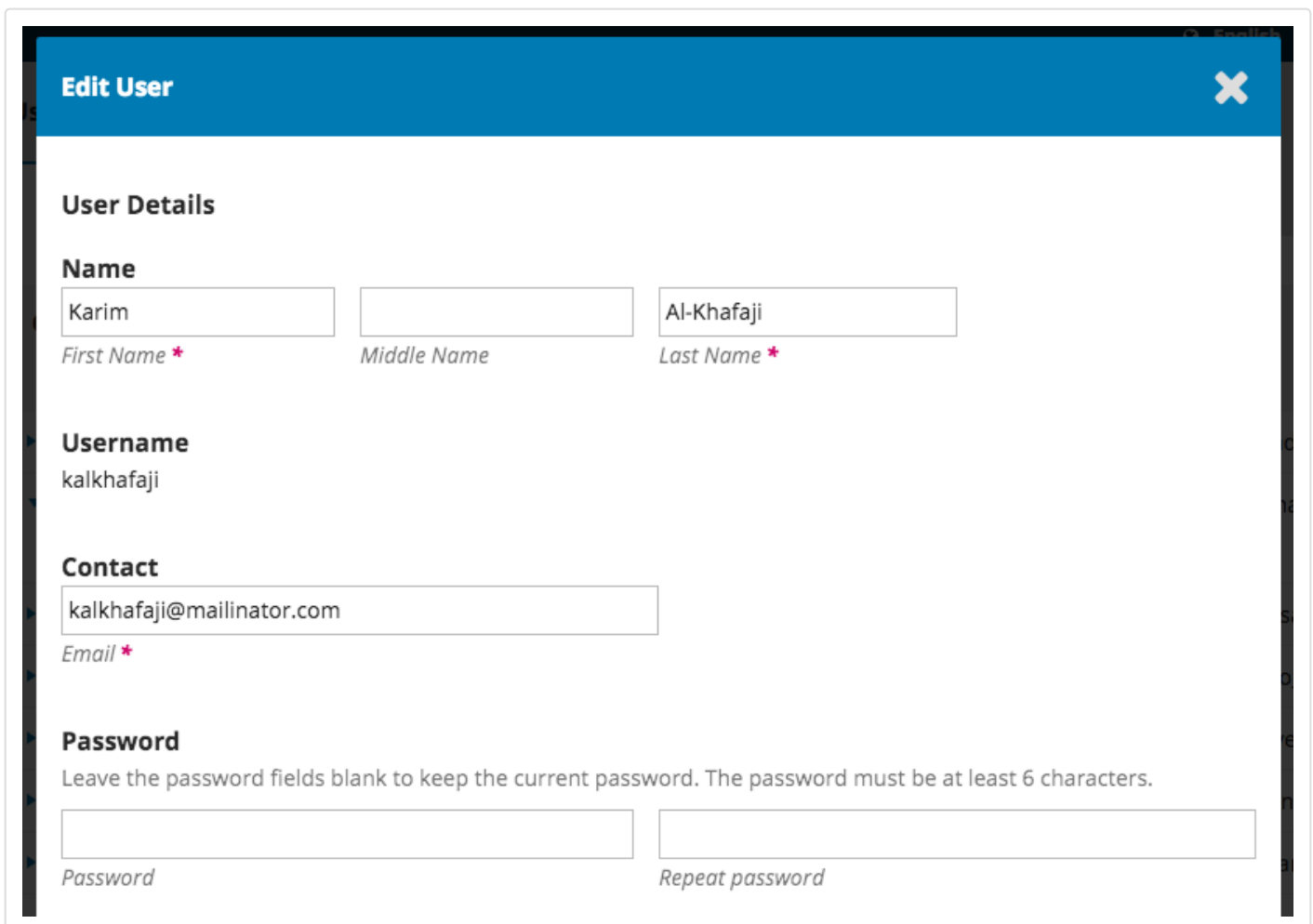
The screenshot displays the 'Users & Roles' management interface. On the left is a sidebar menu with categories: Submissions, Issues, Announcements, Payments, Settings (with sub-items: Journal, Website, Workflow, Distribution), **Users & Roles** (highlighted), Statistics (with sub-items: Articles, Editorial Activity, Users, Reports), Tools, and Administration. The main panel is titled 'Users & Roles' and has four tabs: 'Users', 'Roles', 'Notify' (active), and 'Site Access Options'. Under the 'Notify' tab, there is a section titled 'Roles' with the instruction 'Select the users who should receive your email notification.' Below this is a list of roles with checkboxes: Journal manager, Journal editor, Production editor, Section editor, Guest editor, Copyeditor (checked), Designer, Funding coordinator, Indexer, Layout Editor, Marketing and sales coordinator, Proofreader, Author, Translator, Reviewer, Reader, and Subscription Manager. Below the roles list is a 'Subject' field containing the text 'Style guide reminder' and a small icon. Underneath is an 'Email' section with a rich text editor toolbar (containing Bold, Italic, x², x₂, and a link icon) and a text area containing the email body: 'Dear Copyeditors, I am writing to remind you of some key features of our journal's style guide.'

This email feature can be used to send practical, core service emails to users who are actively working on the journal. For example, you might send an email to all copy editors reminding them of the “house style” for a particular word use or spelling. Avoid using this feature to notify large numbers of readers; the Announcement feature is preferable for large broadcast emails. See [Website Settings > Setup > Announcements](#) for details about this feature.

If several recipients flag your message as spam, it could result in all emails from the journal being sent to the spam folder. Care must be taken not to abuse this feature by sending excessive, unwanted emails. Become familiar with anti-spam and email privacy laws in your region, such as CASL in Canada and GDPR in the EU and UK. Note that there is no “unsubscribe” option available for users who receive these emails.

It is not possible to add cc or bcc addresses other than your own, or to add attachments to messages. To send attachments you can instead use the Discussion feature or the Submission Library.

Edit User allows you to make changes to that user’s account.



The screenshot shows a web form titled "Edit User" with a blue header and a close button (X) in the top right corner. The form is organized into sections:

- User Details**
 - Name**: Three input fields for "First Name" (containing "Karim"), "Middle Name" (empty), and "Last Name" (containing "Al-Khafaji"). Each field has a red asterisk indicating it is required.
- Username**: A text field containing "kalkhafaji".
- Contact**: A text field for "Email" containing "kalkhafaji@mailinator.com".
- Password**: Two text fields for "Password" and "Repeat password". A note above the fields states: "Leave the password fields blank to keep the current password. The password must be at least 6 characters."

Disable keeps the account in place, but blocks the user from accessing it.

Remove un-enrolls the user from all roles in the journal, but the user account remains in the system. The only way to actually remove a user account from your system is to **Merge Users** (see below).

Login As allows you to temporarily log in as that user, for example, to complete an outstanding task.

Merge User

The Merge User feature lets you fold this user account, including any submissions or assignments, into another user account on your system.

Note: This is the only way to completely delete an account from the system.

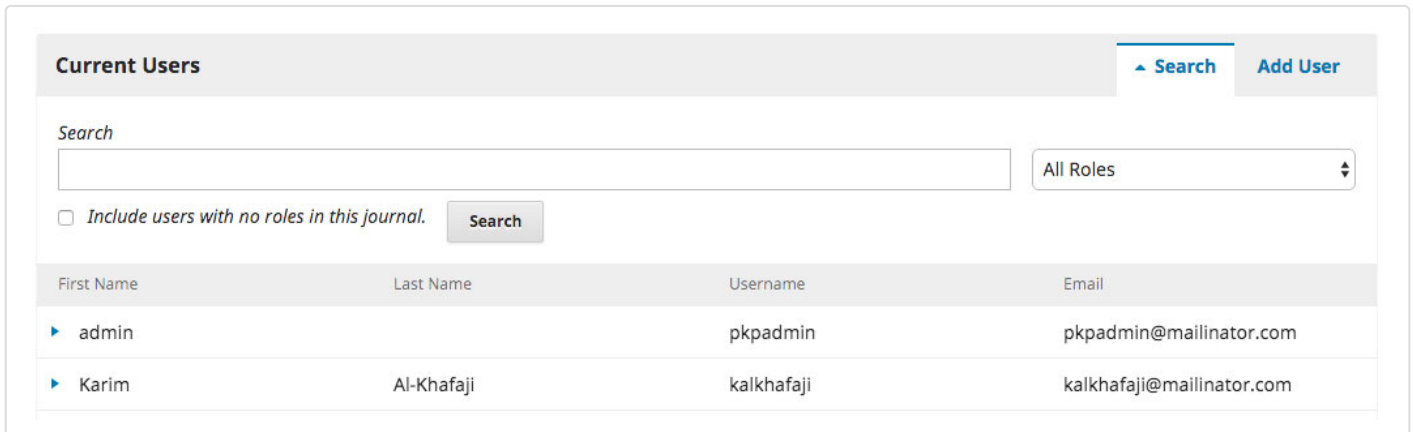
You may want to create a dummy user account (e.g., Deleted Users), and use that to merge unwanted accounts into.

To merge users:

1. At Users & Roles > Users, find the user account you want to remove
2. Click the blue arrow next to the username
3. Click **Merge User** from the menu that appears below
4. Find the user account that you want to merge this user account into (the user you want to maintain)
5. Click the blue arrow next to username
6. Click **Merge into this user**
7. Press **OK** to confirm

Search Users

When you have a large number of users, you will want to take advantage of the search feature.

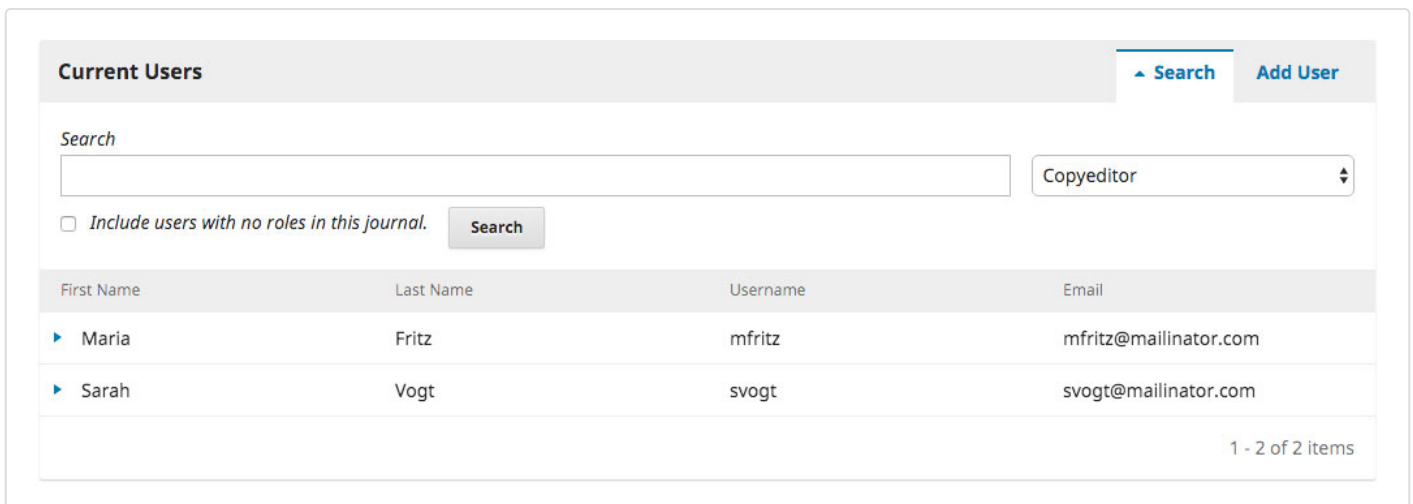


The screenshot shows the 'Current Users' interface. At the top, there is a header with 'Current Users' on the left and 'Search' and 'Add User' links on the right. Below the header is a search section with a text input field labeled 'Search', a dropdown menu set to 'All Roles', and a checkbox labeled 'Include users with no roles in this journal.' with a 'Search' button. Below this is a table with the following data:

First Name	Last Name	Username	Email
▶ admin		pkpadmin	pkpadmin@mailinator.com
▶ Karim	Al-Khafaji	kalkhafaji	kalkhafaji@mailinator.com

This can help you quickly find a user by first name, last name, or email address, or to see all users in a particular role.

Note: If you leave the Search field blank, select a Role, and hit Search, you will get a list of all users in that role (e.g., all copyeditors).



The screenshot shows the 'Current Users' interface with the search results for the role 'Copyeditor'. The search field is empty, and the dropdown menu is set to 'Copyeditor'. The 'Search' button is highlighted. Below this is a table with the following data:

First Name	Last Name	Username	Email
▶ Maria	Fritz	mfritz	mfritz@mailinator.com
▶ Sarah	Vogt	svogt	svogt@mailinator.com

1 - 2 of 2 items

Add User

To add a new user to your journal, select the Add User link. This will open a new window with a set of fields to fill in.

Add User



Step #1: Fill in User Details

Name

First Name *

Middle Name

Last Name *

The username must contain only lowercase letters, numbers, and hyphens/underscores.

Username *

Suggest

Contact

Email *

Password

Password *

Repeat password *

Once these fields are completed and you hit Save, you will then be asked to assign roles to the new account. Use the *Add Role* link to open the role selector.

Add User ✕

Step #2: Add User Roles to Jane Jones

Add Roles **Add Role**

Name	Designation
Reviewer	

Save **Cancel**

** Denotes required field*

Once you have added all of the roles, hit the **Save** button.

Register a User from Another Journal

On multi-journal installations, an Administrator can register a user from Journal A as a user on Journal B.

1. Log in to Journal B as an Administrator
2. Go to Users & Roles > Users
3. Search for the user from Journal A that you want to register on Journal B, checking off **Include users with no roles in this journal**
4. When the user appears, click the blue arrow next to their name
5. Click **Edit User**
6. Scroll down to **User Roles** on the Edit User box that appears.
7. Check off the role that you want the user to have on Journal B

8. Click **Save** at the end of the form

If a User Can't Log In

If a user can't log in to your journal site, tell them to select **Forgot your password** on the Login page. They will then receive a reset password link by email and will be able to reset their password.

If the user has further issues, a Journal Manager or Editor can do the following:

1. Go to Users & Roles > Users
2. Find the user who can't log in and click the blue arrow next to their name
3. Click the **Edit User** button that appears below
4. Enter a new password in the **Password** field, making note of what the password is
5. Check off **User must change password on next log in**
6. Click **Save** at the end of the form
7. Send the new password to the user and instruct them to log in with it

If the user still cannot log in, their account may have been disabled. To re-enable it:

1. Go to Users & Roles > Users
2. Find the user who can't log in and click the blue arrow next to their name
3. Look below their name for **Enable** or **Disable**. If Disable appears, the account is already enabled. If Enable appears, click it to re-enable the account.

Permissions and Roles

This PKP School video explains how to manage roles in OJS. To watch other videos in this series, visit [PKP's YouTube channel](#).

The OJS workflow revolves around different roles with different permissions and responsibilities for each user, allowing them access to different parts of the workflow. Users in the system must have at least one role. Users can also have more than one role, for example, being a Journal Manager, Editor, and Author in the same journal.

Each role is first assigned a permission level, which will broadly define what level of access a user has to a particular journal. Roles are then further customized by providing a position name, and granting or restricting access to various stages of the Editorial Workflow.

There are a number of predefined roles that you can use and edit in OJS. Read in-depth about these predefined roles organized by their permissions level. Italicized roles are new in OJS 3.

- The **Site Administrator** is a single user responsible for administration of the entire OJS installation. This permissions level will not appear in user lists or in role settings.
- **Journal Managers** have access to the entire Editorial Workflow, as well as all other journal settings. Available predefined Journal Manager roles: Journal Manager, Journal Editor (formerly “Editor” in OJS 2), Production Manager
- **Section Editors** have access to the entire Editorial Workflow, but cannot make any changes to journal settings. Available predefined Section Editor roles: Section Editor, *Guest Editor*
- **Assistants** can access only the parts of the Editorial Workflow assigned to their role. Available predefined Assistant roles and their assigned editorial workflow stages:
 - Submission & Review stages: *Funding coordinator*
 - Copyediting stage: Copyeditor, *Marketing and sales coordinator*
 - Production Stage: *Designer, Indexer, Layout Editor, Proofreader*
- **Reviewers** are users who appear when you’re assigning reviews in the Editorial Workflow and have access to that stage when they’re assigned.
- **Authors** can make new submissions.

- **Readers** can access the reader-facing website. This is the minimum permissions level granted to all users.
- **Subscription Managers** can edit site access settings as well as settings related to subscriptions. This is a new permissions level in OJS 3, with one predefined role, *Subscription Manager*.

Predefined and custom roles can be checked from the Roles tab.

The screenshot shows the 'Users & Roles' management interface. It features a navigation bar with 'Users', 'Roles', and 'Site Access Options' tabs, and a 'Help' button. The main content area is titled 'Current Roles' and includes a search bar and a 'Create New Role' button. Below this is a table listing 17 roles with their respective permission levels and access to five editorial stages: Submission, Review, Copyediting, and Production. At the bottom, there is a pagination control showing 'Items per page: 100' and '1 - 17 of 17 items'.

Role Name	Permission level	Submission	Review	Copyediting	Production
▶ Journal manager	Journal Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Journal editor	Journal Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ Production editor	Journal Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ Section editor	Section Editor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ Guest editor	Section Editor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ Copyeditor	Assistant	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
▶ Designer	Assistant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
▶ Funding coordinator	Assistant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Indexer	Assistant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
▶ Layout Editor	Assistant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
▶ Marketing and sales coordinator	Assistant	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
▶ Proofreader	Assistant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
▶ Author	Author	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ Translator	Author	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
▶ Reviewer	Reviewer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Reader	Reader	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Subscription Manager	Subscription Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

From this page, you can see each role, and the editorial stage each role can access. A good example of this is the Copyeditor role, which can only access the copyediting stage. Copyeditors cannot jump to the Review stage to see what happened during the peer review process. See the Editorial Workflow chapter for more information about the different editorial stages.

In addition to assigning and editing the predefined roles, Site Administrators and Journal Managers can also create new roles or rename existing ones.

Editing Roles

Unchecking a box removes access to that stage for users with that role.

Selecting the blue arrow to the left of the role name reveals the edit link. Clicking this opens the editing window.

Edit ✕

Role details

Permission level *

Journal Manager ▼

Role Name *

Journal manager

Abbreviation *

JM

Stage Assignment

- Submission
- Review
- Copyediting
- Production

Role Options

- Show role title in contributor list
- Allow user self-registration
- This role is only allowed to recommend a review decision and will require an authorised editor to record a final decision.

Permission Level: This indicates how much a user with this role can do in any stage.

The Journal Assistant level can communicate with other users and upload and revise files. In Journals where only one user has been assigned with an Assistant role, they will be automatically assigned to a new submission. Once a second person has been assigned this role, this action will stop.

Role Name: You can use this field to easily rename any role.

Abbreviation: Each role must have a unique abbreviation.

Stage Assignment: This allows you to determine which stage users with this role can access.

Role Options: Use these checkboxes to show anyone with this role in the contributor list (e.g., the author list). As of OJS 3.2, roles can be assigned permission to edit submission metadata by enabling the checkbox.

Use the second option to determine whether users can self-register in this role.

Authors and Reviewers are good candidates for self-registration. You would definitely NOT want to allow users to self-register as Journal Managers or Editors!

The third option is useful for guest editors or possibly section editors, depending upon your preferred workflow and authority chain.

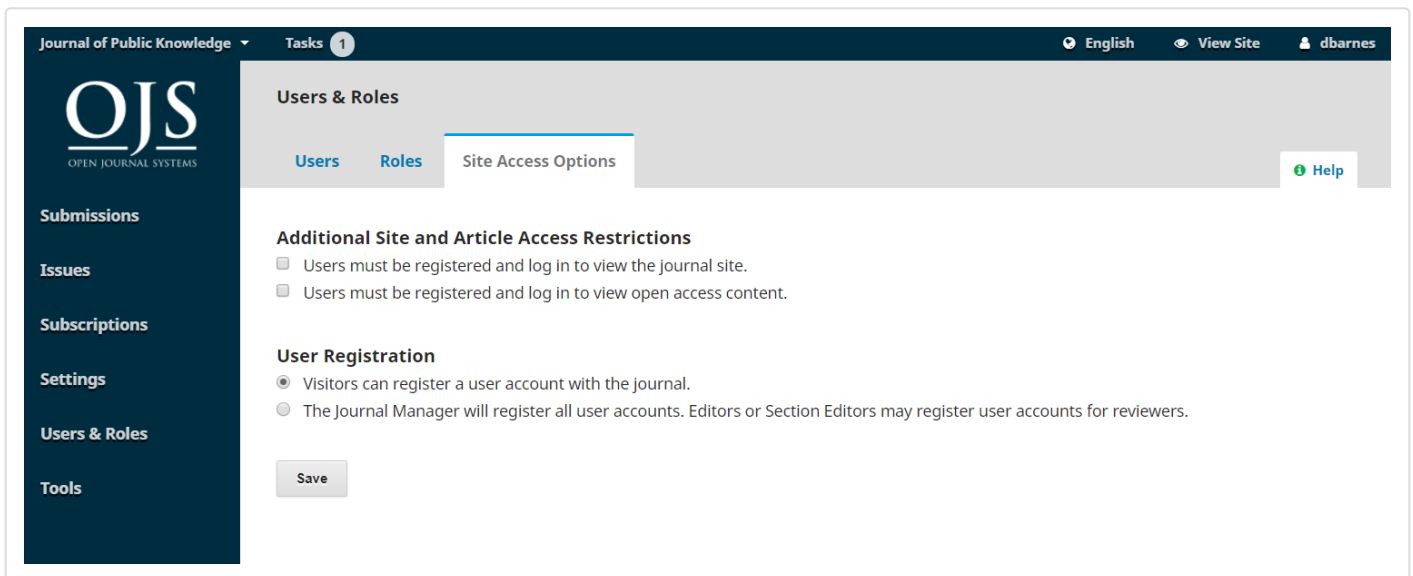
Create New Roles #

Use the *Create New Roles* link to open a window where you can create a new role for your journal, including setting which stages it can access and how much permission it should have.

Site Access Options

This PKP School video explains how to configure site options in OJS. To watch other videos in this series, visit [PKP's YouTube channel](#).

This page allows you to determine how readers can access your journal.



Additional Site and Article Access Restrictions: Choose from these options to limit access.

Keep in mind that while requiring registration to read open access content can be convenient for your tracking, it can dissuade some people from reading your content. Use with care.

User Registration: This option allows you to determine whether users can create their own accounts or must be enrolled by a Journal Manager.

Allowing users to register themselves, but only into Author, Reviewer, or Reader roles, is a good choice.

