



AGORA

Scholarly Open Access Research in European Philosophy
Project Reference: 270904

Report on Deployment of Customized OJS

Deliverable number	<i>D3.2</i>
Destination level	<i>PP</i>
Delivery Date	<i>30/09/2011</i>
Author	<i>Alessio Piccioli</i>



This CIP project is co-funded by the European Commission under the Information and Communication Technologies Policy Support Programme (ICT PSP), which aims at stimulating a wider uptake of innovative ICT-based services and the exploitation of digital content across Europe by citizens, governments and businesses.

Document Control

Project	AGORA
Document Title	OJS Installation report
Keywords	OJS, customizations, installation, metadata
Author	Alessio Piccioli
Work Package	WP 3

Document Approval

Document authorized by

Name

Alessio Piccioli

Role

Work Package Leader

Document issued by

Name

Alessio Piccioli

Organization

Net7 s.r.l.

Date

30/09/2011

Version

Final

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Executive Summary

The Agora Project will publish new and already existing scientific content and carry out experiments to advance new paradigms in Open Access publishing. It will add a customized OJS publication layer to each content partner's (UIB with ONTOS, CNRS, CNR) already existing node of the *Philosource* federation. Each content partner will implement a specific OJS customization and, starting from month 13, each partner will store the content for use in the Agora experiments in their respective OJS.

During the first 9 months of the project Agora's technical partner Net7 organized two Technical Meetings during which OJS requirements and customizations for all content partners were discussed. All required needs and features have been collected and resulted in Deliverable D3.1, the 'Guidelines on OJS customization and deployment and metadata format'.

In order to ease the customization for each content partner and in order to produce more uniform instances of the OJS software across all Agora partners, Net7 developed two OJS plug-ins to handle the requests raised during the Technical Meetings. The two plug-ins are:

1. The AGORIZE plug-in, used for converting metadata to URIs;
2. The AGORATEIZE plug-in, used for modification of the submission process in order to import metadata directly from XML-TEI documents (when the initial document upload is in XML-TEI format), and to export the final, public version from OJS to XML-TEI format.

Section A of D3.2 reports on the status of each content partner's OJS installation and provides the Web addresses where these installations may be accessed. Section B briefly describes the two plug-ins and their features. Section B is based on the software documentation.

A. Status of Agora OJS Installations

As foreseen in the Description of Work (DOW), the following content partners have proceeded with the OJS installation and customization:

1. CENTRE NATIONAL DE LA RECHERCHE SCIENTIFIQUE (CNRS)
2. UNIVERSITETET I BERGEN ORGANISASJONSEDD (UIB)
3. CONSIGLIO NAZIONALE DELLE RICERCHE (CNR)

Net7 has verified on their instances the correctness of the installation according to the Guidelines issued in D3.1. The following checklist has been used to validate an OJS instance:

1. Check if the URI is working
2. Check if the admin login is working
3. Verify if the last version of AGORIZE plug-in (0.2.0.1) is installed
4. Check if the last version of the AGORIZE plug-in is well configured (Medusa account, basic channel created, token inserted)
5. Check if the last version of the AGORATEIZE plug-in (0.0.1.1) is installed.

The following table shows the current addresses of the Agora OJS installation:

Partner	OJS URL	Note
CNRS	http://nietzschesource.tge-adonis.fr/ojs-2.3.6/	<i>Temporary URL</i>
UIB	http://bilbo.uib.no/ojs/	<i>Temporary URL</i>
CNR	http://151.100.146.63/ojs	<i>Temporary URL</i>

During the next phase of the project, OJS instances will undergo further customization before being used to publish the first issue of content in month 12 (D4.1). Net7 will offer continued support to the content partners and will issue updated versions of the plug-ins should new requirements arise from the use of the software.

B. Plug-Ins for OJS Customization

1. AGORIZE plug-in

Introduction

The AGORIZE plug-in for OJS is used to convert OJS Standard Simple Dublin core Metadata into URI using a web service called Medusa. You can find more info on the Medusa Service at

<http://medusafront.netseven.it/doc/MedusaUserAndDeveloperManual.pdf>

In this document you can find information on how to install, configure, customize, and use the plug-in. Updated documentation on the AGORIZE plug-in can be found at <http://agora.netseven.it/docs.php?url=agorize>

‘How to’

1. Install or update the plug-in using the OJS plug-in system. You can download the latest version at <http://agora.netseven.it>
2. You will find the AGORIZE plug-in in the “Generic” category. Click the “SETTINGS” link.
3. Fill the form with the required data. The following provides a quick reference:
 - ⤴ **API Key** field
Your API Key. Please refer to the Front App documentation to learn more about this field. Official URL:
[http://medusafront.netseven.it/doc/MedusaUserAndDeveloperManual.p
df](http://medusafront.netseven.it/doc/MedusaUserAndDeveloperManual.pdf)
 - ⤴ **User ID** field
ID of the Front App user. Please refer to the Front App documentation to learn more about this field. Official URL:
[http://medusafront.netseven.it/doc/MedusaUserAndDeveloperManual.p
df](http://medusafront.netseven.it/doc/MedusaUserAndDeveloperManual.p)
 - ⤴ **People, Countries, ...** fields
List of tokens. The token of the field **x** is used when querying Medusa with a term that belongs to the **x** metadata. You will need to log into the Front App and create a channel in order to get your tokens. Official URL:
[http://medusafront.netseven.it/doc/MedusaUserAndDeveloperManual.p
df](http://medusafront.netseven.it/doc/MedusaUserAndDeveloperManual.p)
 - ⤴ **People, Countries, ...** checkboxes
You can disable some of the *agorized* fields using the checkboxes on the right hand side. The disabled fields will be ignored when checking metadata.
4. During the **editing** phase of a submission you will notice an additional section entitled *AGORIZED METADATA*, followed by a status message. Proceed to

- the “Status messages and metadata checking” section.
5. In case of any configuration problems the status message will be highlighted in *red* and will allow you to access the settings of the plug-in. If the plug-in is set correctly, click in the “Click here to edit” field to open the form. If you still cannot see the link, see the “Quick reference” of the “Status messages and metadata checking” section.
 6. The AGORIZE plug-in consists of a list of addresses that associates each address with a metadata item. Clicking on a field you can select a specific address (the plug-in will display a list of suggestions using the Medusa service) that will then be associated with that particular metadata item. Once saved (“Save” button) all associations are stored in the database. Note that only the checked fields (see the settings area of the plug-in) will be listed here. Even when disabling a field, the existing association will be preserved.
 7. When the submission is not scheduled for publication you can both edit (click on the address you want to change) and delete (click the “x” next to the address) addresses as you see fit. When the submission is scheduled for publication you can only edit.

Status messages and metadata checking

The AGORIZE plug-in will not allow you to assign the article to an issue for publication in OJS until the conditions are met that are required for the Agora metadata.

Quick reference

In case a submission does not include default metadata you should see a warning that ‘Some metadata are missing’. You will first need to set the article’s metadata. Click on the link provided in order to access the OJS editing form.

Once all the article’s metadata has been set you will need to associate their values with addresses. Each metadata item must be associated with its own address. Otherwise you will see the error message ‘You have to set the associations of this article’.

Once you have set all associations you will receive the success message ‘Metadata check passed’. You can now assign the submission to an issue.

Troubleshooting

‘There is no user ID set’, or
‘Some enabled fields have no associated token’, or
‘There is no API key set’.

In each case some of the settings are still missing. Please repeat the steps described in ‘How to’ sections 1 and 2.

2. AGORATEIZE plug-in

Introduction

The AGORATEIZE plug-in offers a number of features involving the import and export of XML-TEI documents into OJS publication nodes. The features are the following:

1. In the submission process (following the Agora Guidelines), if the first submission is in XML-TEI format then a first version of DOC/PDF is automatically created according to an Agora style sheet. All metadata mapped (see below for the mapping between OJS metadata and XML-TEI tags) to OJS fields are imported.
2. In the submission process, if the first submission is in PDF/DOC then the first version of XML-TEI is automatically created. No metadata are imported, and no OJS mapped metadata are present.
3. Please note, once the document has been updated for the first time the “official” repository for metadata is OJS, and further changes will have to be carried out in OJS.
4. As the last step during the article submission (issue publication) a definitive version in XML-TEI will be created as follow:
 1. For the body the last version of the XML-TEI uploaded file will be used.
 2. For the XML-TEI header all *mapped* metadata present in the last uploaded XML-TEI version will be added and/or changed using the now “official” metadata coming from OJS database (see 3 above).
 3. All metadata that are *not* mapped will not be modified and will be still present in the last version of the XML-TEI.

OJS Metadata

- ⤴ Title → Mandatory
- ⤴ Author.FirstName → Mandatory
- ⤴ Author.LastName → Mandatory
- ⤴ Author.Email → Mandatory (if NOT → Common Strategy)
- ⤴ Author.Affiliation → Optional (*to be confirmed*)
- ⤴ Subject (Keywords) → Mandatory
- ⤴ Description (Abstract) → Optional (if NOT → “No Abstract”)
- ⤴ Contributor → Optional
- ⤴ Language → Mandatory
- ⤴ Coverage → Optional

XML-TEI Metadata

At the time of creating a submission the plug-in checks the uploaded file. If the file extension is XML and if the contents of the file conform to TEI specifications then a

message is displayed to the user.

The plug-in will show the user all retrieved metadata and provide the user with the opportunity to import additional metadata or make changes prior to importing.

Import of other formats (such as DOC or PDF) is possible with the only difference that in this case also an XML file will be generated that conforms to TEI format.

Before the final publication, the plug-in will create an additional XML-TEI document containing all the information and metadata of the article.

Minimal template

The following provides a template of a minimal TEI header

```
<teiHeader>
  <fileDesc>
    <titleStmt>
      <title><!-- title of article here --></title>
      <author>
        <name><!-- authors first and other names --></name>
        <surname><!-- author's surname --></surname>
        <email><!-- email address for author --></email>
        <affiliation><!-- affiliation string for this author
--></affiliation>
      </author>

      <!-- add content partner id somewhere -->
    </titleStmt>
    <publicationStmt>
      <authority><!--name of content provider --></authority>

      <availability>
        <p><!-- Boilerplate text to be defined e.g.
"Unpublished digital version prepared for AGORA project -
--></p>
      </availability>
    </publicationStmt>
    <!-- Important -->
    <sourceDesc>
      <!-- (A), (B) or (C): see below. -->
    </sourceDesc>
    <profileDesc>
      <textClass>
        <keywords><!-- topic keywords --></keywords>
      </textClass>
      <langUsage>
        <language ident="en"/>
      </langUsage>
    </profileDesc>
  </fileDesc>
  <revisionDesc>
    <change when="2011-03-22">First TEI XML version</change>
  </revisionDesc>
</teiHeader>
```

Metadata fields through XPath queries

The following table provides the corresponding fields used to map between metadata fields required by OJS and the components required for an Agora-conformant TEI document.

OJS Field	XPath to TEI Header	Comments
Title	teiHeader/fileDesc/titleStmt/title	
Author surname	teiHeader/fileDesc/titleStmt/author/surname	<i>If there are multiple authors, multiple author elements will be available</i>
Author other names	teiHeader/fileDesc/titleStmt/author/name	
Author email	teiHeader/fileDesc/titleStmt/author/email	
Author affiliation	teiHeader/fileDesc/titleStmt/author/affiliation	
Subject keywords		
Subject taxonomy		<i>http://philpapers.org</i>
Description (Abstract)	TEI/text/front/div[@type='abstract']	
Contributor	//funder	
Language	langUsage/language/@ident	
Coverage		<i>To be confirmed</i>
Licence	availability/p	<i>Export only</i>