After the migration

What editors like (and miss) after moving from bepress to OJS

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Hello! I'm Kristin Hoffmann, and my colleague Emily Carlisle-Johnston and I are going to tell you about a journal migration at the University of Western Ontario in Canada. This migration was from the bepress Digital Commons platform to the Public Knowledge Project's Open Journal Systems platform.

I'll start with some background about our journal publishing program and why we decided to migrate journal platforms.

But what we want to focus on here are the experiences of editors and librarians now that we are on OJS. We briefly surveyed our journal teams, and Emily will tell you about the survey and what editors told us. I'll then wrap up with the librarian's perspective after the migration.

Background

Our library has been a bepress customer since about 2008, and probably its largest customer in Canada.

bepress Digital Commons does three things:

1. repository
2. theses & dissertations
3. journal hosting

A big part of why bepress has been good for us is that its Digital Commons platform does three things in one platform: the repository, workflow & publishing for theses & dissertations, and journal hosting.

For many years, we had one librarian who managed all three of these components, and usually that person supported Digital Commons in addition to other job responsibilities. Over time, this became too much for one person.

In spring 2017, Kristin takes on support for journal hosting.

In August 2017, bepress is acquired by Elsevier.

In spring 2017, we decided to separate out responsibilities for journal hosting, and I took on that work.

In August 2017, just a few months later, bepress announced that they had been acquired by Elsevier. This prompted questions and discussion for us about continuing to use their platform. I personally felt (as did several colleagues, and many librarians generally) that this was not a positive change, that this was a move by a large commercial publisher to coopt open access for profit.

Digital Commons is a fully hosted
platform. They do hosting, technical
support, and customer support.

However, bepress offers a fully-hosted platform - hosting, technical support, and customer support for editors, not just for librarians, are all included. Our library does not have the technical capacity to adopt open source, locally-hosted repository or thesis-publishing software.

We discovered, though, that we DID have the capacity to move journal hosting, because of our provincial consortium and their Scholars Portal service, which provides hosting for OJS. (Attend the presentation about Scholars Portal's hosting service on Friday in the last session of the day to learn more!) And I was familiar with OJS from my work as an editor of the Canadian Journal of Academic Librarianship.

OJS is aligned with our values.

So OJS is a more open platform because it's open source, it feels more connected to the Open Access community. It's aligned with our values as a library publisher.

We also expected OJS to work better for multilingual journals and site customization, and to allow for more tailored support from librarians.

We also expected that it would work better for multilingual journals, that it would be easier for editors to customize their journal sites because the platform isn't proprietary - bepress limits customizations and requires that their customer support staff do certain changes. We also expected that hosting with OJS would allow us as librarians to provide more tailored support for journal teams because if they were no longer going to bepress customer support staff with questions, we would have a better sense of what they needed.

By November 2017,
26 journals were on the move to OJS.

So by November 2017 we had decided to migrate our 26 journals to OJS.

We did not have a firm deadline for our migration because we are still a bepress customer and weren't going to lose access to the platform.

The migration to OJS finally wrapped up in fall 2020, three years later.

A majority of journals moved over 2018, several more in 2019, and the last 2 went live in OJS in 2020. We've added a few more journals so we now host 37 on OJS.

And now Emily will talk about the survey we sent to editors after the migration.

The survey

To gauge whether journal editors have since experienced the benefits that we anticipated from the migration, we surveyed them on their experiences using each platform in March of this year.

We asked editors about

1. whether they missed select Digital Commons features
2. the helpfulness of select OJS features
3. the ease of use of each platform
4. how long it took to learn OJS

The survey was short, focused on whether they missed any key features from Digital Commons, how helpful they find select features from OJS, the general ease of use of each platform, and the length of time it took them to feel comfortable with OJS.

We received 33 responses, 12 from editors who had used Digital Commons

We received 33 total responses, 12 of which were from editors who had used bepress' Digital Commons. That left 21 respondents who had become editors of their journal only since it moved to OJS, so they didn't have experience with Digital Commons to report on.

Survey takeaways

So, what did we learn from the survey?

Digital Commons and OJS were rated similarly according to ease of use

Our biggest takeaway was that the two platforms were "rated" pretty similarly according to how easy editors found it to navigate the back end of each - the back end being where they manage publishing workflows and edit or customize their public-facing journal pages. 75% of the editors who reported on Digital Commons deemed the back end "very easy" or "moderately easy" to use, compared to 74% of editors who reported the same for OJS. So, neither platform came away as the obviously more user-friendly platform.

When it comes to key features available with each platform:

The features that editors miss the most from Digital Commons are:

1. the map of visitors and downloads
2. the "at a glance" table

Editors who reported on their experience with Digital Commons listed the map of visitors and downloads, and the "at a glance" table in the dashboard – which would show the status of each submission – as the features that they miss the most.

Some editors also miss the automatic pre-deadline review reminders and the ability for authors to upload new submission files

Other features that editors reported missing, although to a lesser degree, were the automatic pre-deadline review reminders that the system would send to reviewers, and the ability for authors to upload new submission files after their initial submission. These answers didn't exactly come as a surprise to us, because we've heard similar nostalgia for these features since the migration.

Editors find the ability to edit public-facing pages and the support received from Western librarians to be the most helpful features of OJS

As for OJS, editors found the ability to edit public-facing pages themselves and the availability of support from Western librarians to be the most helpful features of OJS.

Other OJS features produced a mixed response, like the ability to:

1. work and add content in multiple languages
2. post announcements
3. customize a journal's appearance

Other OJS features produced a much more mixed response from editors, like the ability to work and add content in multiple languages (since not all journals have a need to), the ability to create and post announcements, and the ability to customize their journal's appearance with themes and CSS. So, while increased flexibility and control over journal customization is a key distinction between OJS and Digital Commons, many editors are not currently leveraging this feature to the full extent.

What the survey results tell us

Together these survey results tell us a few things:

Our migration was values-driven: to keep Open tools in the hands of the Open community.

First, the fact that the two platforms were rated fairly similarly highlights and confirms that our decision to migrate the journals from Digital Commons to OJS was very much a values-driven decision. As Kristin said, it was motivated, in large part, by a desire to keep open tools in the hands of the open community, and to give the library more control over open publishing. This remains one of the key benefits.
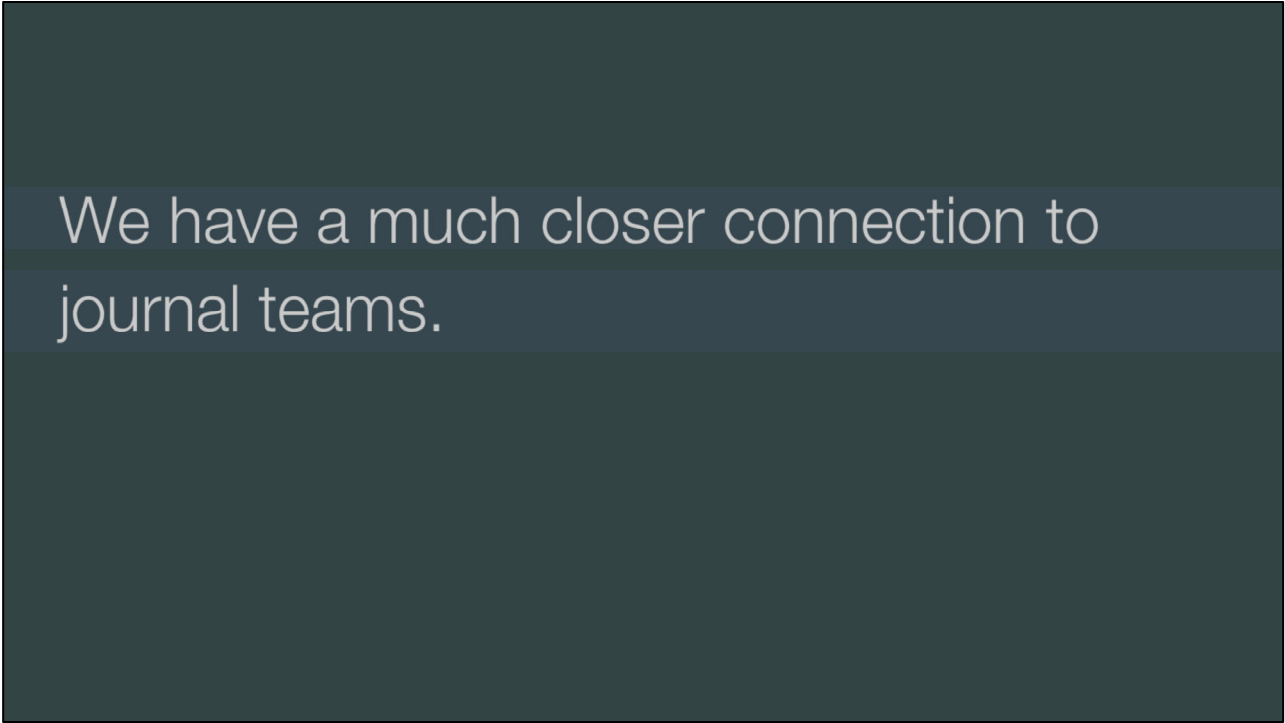
Editors' approaches to publishing platforms are task-driven.

Second and finally for this section, the survey results and comments suggest to us that editors may approach publishing platforms from a "task-driven" perspective. Regardless of platform, they're focused on learning how to do a specific task for their journal, and once they learn those steps, they're good to go. This is helpful for us to know as the people who support and often train them to use publishing platforms.

So those are the main takeaways from the survey. Now Kristin will talk about what we've learned since the migration from the librarian's perspective.

The librarian's perspective

Have we as a library publisher experienced the benefits we anticipated with OJS?

We have a much closer connection to journal teams.

We now have a much closer connection to journal teams. This is largely because all editors' questions now come to us rather than to bepress customer support staff.

With that said, different editors do have their own preferences for working with us, how much contact they have with us, how they get help from us. We work with some more closely than others, but we have a better sense overall of what our journal teams are doing.

We have more flexibility, autonomy, and creativity to help journal teams.

While we thought there would be more flexibility for journal teams, we think really it's that *we* now have more flexibility and autonomy to help journal teams because we have more control and ability to work with the OJS platform than we did with Digital Commons. So we can offer suggestions of how to work with the platform, we can help editors try new approaches that fit with their workflow and the OJS functionality.

We have more work to do; we are now "customer support."

All of that means that we definitely have more work to do, especially because we are now essentially the "customer support." I also have to say that I wanted this work to grow and I wanted more of it, and it came at a time when our library had the capacity for this work to grow. In spring 2018, our Research and Scholarly Communication unit was created because of a re-organization, and my position changed so that I have more or less been able to do journal publishing as a full-time role.

We also face some challenges and limitations, that are becoming more apparent now that all our journals are using OJS.

We are limited in the support we can offer to customize journals' appearance.

One example of a specific, practical challenge is related to customizing journals' look and feel. Editors have more flexibility to do this with OJS, but as Emily briefly mentioned, they had mixed feelings about how helpful this is. In the library, we're also limited in how much we can help them. Librarians who have the availability and interest to help journal teams don't know CSS, and staff who have CSS knowledge don't have the availability or capacity to add this to their work. This may be an area where our expectations with OJS aren't matching up with the reality.

We need to carefully think about and plan for how our services can be consistent and manageable.

An example of a broader, more conceptual challenge is the consistency of services that we offer to all journals. Are we offering more support to journal teams that are in touch with us more? Are other journals being left behind? How much does that matter, and how do we want to address this? These are more about the type of library publishing service we want to offer, and being sure that we can keep providing those services long-term - especially with the growth we've seen in the number of journals we support in just a few years.

What happens next, now that the migration is done?

What are our next plans, now that our migration to OJS is done?

It's time to learn more about what journal editors need.

- step-by-step training?
- support for customization?
- what else?

This brief survey about experiences using Digital Commons and OJS has been revealing, and makes us think that it is probably time to learn more about what journal editors need from us--what we could do for them, what we could help them learn, and how they would like to learn and be supported.
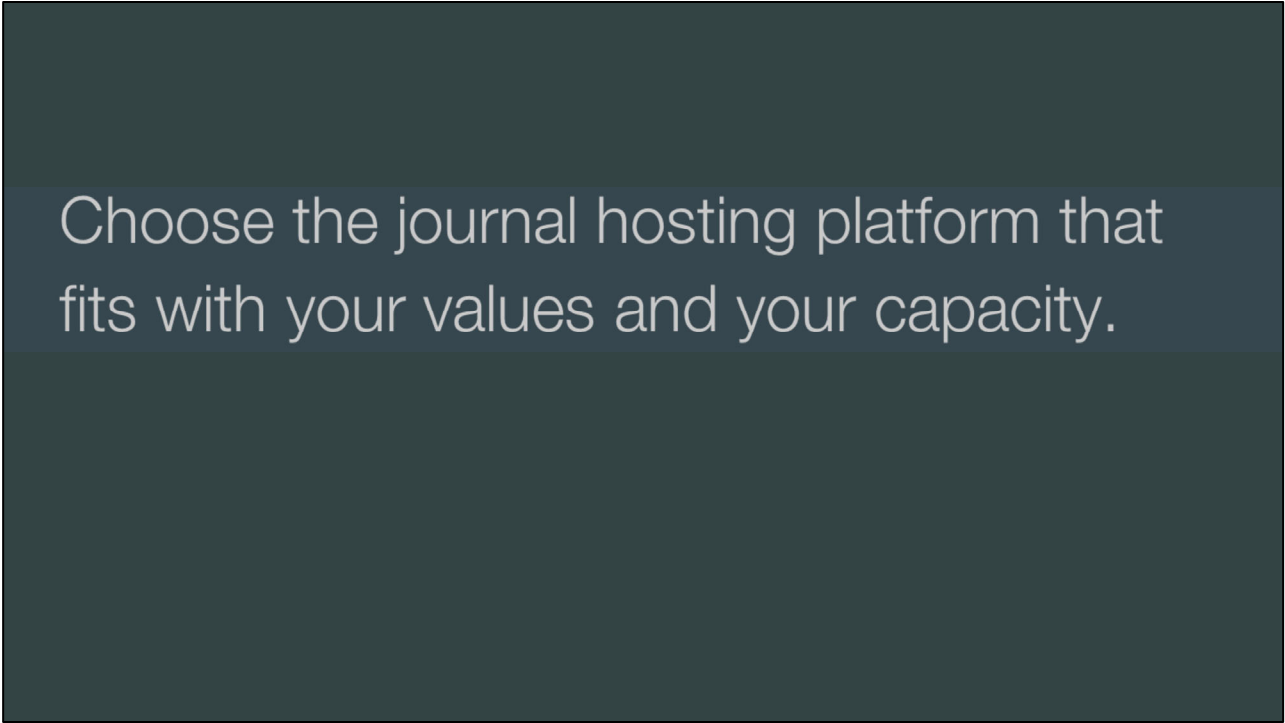
One thing it seems they may need is more step-by-step training and how-tos for new editors or new OJS features. In retrospect, this makes a lot of sense - a lot of the questions that editors ask me are about how to do particular tasks - but we haven't provided how-tos or links to OJS documentation for all editors in a very consistent way.

A second example of what they may need is more support for customization, particularly CSS. Customizing journal appearance was something that is more difficult for several editors who responded to our survey, so again, learning more about what they would like from us in this area would be helpful.

And of course there will undoubtedly be other things our editors will tell us they would like from us.

Our recommendation to you

Last, we want to end with a recommendation to you, if you are wondering whether to migrate your journals to a different platform or what platform to choose.

Choose the journal hosting platform that fits with your values and your capacity.

Because our experience of Digital Commons and OJS shows that either platform will work well for journal teams, we recommend that you choose the platform that fits with your values as a library publisher and that matches the capacity that you have to do various aspects of publishing work.

What questions do you have for us?

Thank you, and we look forward to hearing what questions you have for us!