Note: Welcome to the Episciences documentation. On this site you will find contextual help for each role. Use the search engine to find help for the following roles: author, editor, administrator.
1.1 Account and user profiles

Rights: Editor in Chief, Administrator, Editorial secretary, Editor, Webmaster, Guest editor, Copy editor, Reviewer, Author, Member

If you already have an account on HAL, you do not need to create a specific account to reach Episciences. You just have to fill in your login/password of your HAL account.

1.1.1 Create an account

There are two steps to creating an account:

1. Fill in the information required to create the account in the dedicated form on the journal’s website;
2. Validate the creation of the account by clicking on the activation link received by e-mail.

On the journal’s website, click on “+ Create account” at the top right.

Fields marked with an asterisk are required.
Enter the information:

- **Login**: this is your user name. It must be at least 3 characters long and cannot be changed afterwards;
- **Password**: this must be at least 7 characters long;
- **Password (confirm)**: confirm password;
- **Last Name**: with a capital letter in the first letter (e.g. Jones);
- **First Name**: with a capital letter in the first initial (e.g. Jill);
- **Screen Name**: by default, your first and last name will be displayed;
- **ORCID**: if you already have one, enter your 16-digit ID here;
- **Affiliation(s)**: name or acronym of your organisation(s) (only one per line: use the + button to add more lines);
- **Twitter username or Mastodon**: enter your Twitter account (e.g @anonymous) or Mastodon account (e.g @username@server);
- **Web Site(s)**: enter the website you wish to add (only one per line: use the + button to add more lines);
• **Default Language:** choose English or French as the language to be displayed in the interface;

• **E-mail**: indicate here a valid address to which the validation link will be sent.

Check the box “I am human” in order to validate the information.

### Create account

The account Jill Jones has been created.

You need to validate your account before being able to sign in.

We sent you an e-mail to this address:

This e-mail contains a link on which you need to click in order to validate your account

To finalise the account creation stage, validate it by activating the link received by e-mail. Please note that the account activation e-mail is not sent immediately (it may take some time to receive it). Remember to check that the e-mail has not arrived in the spam folder.

Once the account is created, you can connect to the website.

#### 1.1.2 Modify your profile

To modify your profile, log in and click on “Edit profile” at the top right.
The following information can be added to your account after its creation:

- **Title**: Mrs, Mr, Dr, Prof, etc.;
- **Middle Name**;
- **Picture**: .jpg, .gif or .png format.

You can also add your **ORCID**, fill in your **affiliations** and change the **default language** of the interface.
1.1.3 Changing your password

To change your password, log in and click on “Change my password” in the top right-hand corner.

**Change your account password**

- For security reasons, changing the password will invalidate your sessions and you will have to log in again.

*Required fields

Current password *

New password *

Confirm your password *

It is necessary to enter your current password in order to change it. The new password must be at least 7 characters long.

1.1.4 Forgotten your login or password

If you have forgotten your password or login, click on “Forgotten password?” or “Forgotten username?” at the top right of the “Sign in” button.

- If you have forgotten your password, enter your login and click on “Ask for a new password”. You will receive an e-mail with a link to a page where you can create a new password.

- If you have forgotten your username (login), enter the e-mail address associated with your account and click on “Receive my username”. You will receive an e-mail containing your username.

Please note that e-mails are not sent immediately (it may take some time to receive them). Please also check if they have not arrived in the spam folder.
1.2 User roles

Rights: Editor in Chief, Administrator, Editorial secretary, Editor, Webmaster, Guest editor, Copy editor, Reviewer, Author, Member

There are ten roles in Episciences, each with rights associated with features.

The roles associated with the profile are displayed in the top right-hand corner when you hover the mouse over your username and in the Dashboard section.

Dashboard

My submissions

You haven’t submitted any article yet.

List all my submissions  Submit an article

My account

Jill Jones  Member

Change my email address  Edit profile

Please note: the semantics of roles in Episciences is not necessarily adapted to the organisation of each journal. Thus, a user can have several roles in a journal, to be assigned according to the functionalities he/she has to use.

The roles with the most rights are indicated by an asterisk.

- **Member**: default role assigned to anyone who creates an account on the journal’s website.
- **Author**: can submit an article.
- **Editor**: can assign an article to a section or volume, assign reviewers, make suggestions (accept or reject an article). His/her rights depend on the journal’s settings.
- **Editor-in-chief**: has all rights to the journal. He/she manages users and assigns roles to them. He/she manages the reviewers and the articles. He/she can also configure or modify the journal’s website.
- **Guest editor**: has the same rights as the editor but only on a section or volume.
- **Proofreader**: allows the proofreader to review the article for which he/she has been asked and to enter an evaluation. Depending on the journal’s settings, this role allows communication with the author.
- **Copy editor**: manages the copy editing process, alone or in conjunction with the author, to produce a final version for publication in the journal.
- **Editorial secretary**: makes an initial selection of the articles submitted. He/she can refuse an article (if it does not correspond to the journal’s editorial line, for example) but cannot accept it automatically. He/she can manage users (creation of accounts).
- **Webmaster**: responsible for the journal’s website. This includes setting up the general configuration of the site and access to the style sheet.
- **Administrator**: has all the rights to the journal, including setting the site parameters.
The functionalities linked to each role are summarised in a table, accessible in connected mode: My Account > Permissions

### Episciences | Permissions

The following table depicts the various user permission levels.

<table>
<thead>
<tr>
<th>Action</th>
<th>Editor in Chief</th>
<th>Administrator</th>
<th>Editorial secretary</th>
<th>Editor</th>
<th>Reviewer</th>
<th>Author</th>
<th>Member</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email: Delete customized template and revert back to default one</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Email: Edit the template</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Email: List email history</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Email: Manage automatic reminders</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Email: Send a mail from the platform</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>administratemail-tagslist</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Email: List email templates</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Accept article</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Accepted article - ask author’s final version</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Accepted article - ask author’s validation</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Ask for other editors opinion</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>List only their assigned items</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Copy editing: accept a final version</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Invite a reviewer</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>List all articles regardless of their status</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Publish an article</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Allow updating a review</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
</tr>
</tbody>
</table>
1.3 Article submission

Rights: Author

1.3.1 Prerequisite

The HAL account is used to connect to the journals’ websites. In case of a first deposit or if you do not have a HAL account, you must create an account.

Submitting an article to a journal is a two-step process:

1. deposit of the article proposal (preprint) in an open archive (arXiv, HAL, Zenodo or CWI);
2. submission of the preprint on the Episciences website of the journal.

1.3.2 Logging in to the site

To connect to a journal’s website, click on the “Sign in” button at the top right.

Once logged in, click on the “Submit an article” tab.

Submit an article

- **Repository**: select the open repository in which the article to be submitted to the journal is located;
- **Document identifier**: indicate the document identifier on the open repository (e.g. hal-0000000 for HAL; 0000.0000 for arXiv; 10.5281/zenodo.0000000 or 0000000 for Zenodo);
- **Version**: specify the version of the document to be submitted.

The metadata (first and last names of the authors, title, abstract and keywords) are retrieved by the system.
Depending on the settings of the site, it is possible to propose the article for a volume or a dedicated section, to suggest names of reviewers or to attach a cover letter.

The free field “Comment” allows you to add a note to the editorial team of the journal (this comment will be visible to the editors, writers and reviewers).

In order to be able to submit the article, it is necessary to certify:

- you are the author of this article or you are commissioned by one of the authors in the case of an article written by several authors;
- not to have published or submitted this article anywhere else.

Click on “Submit this article” to validate the submission.
1.3.3 Submit an article to a special issue

If you have been invited to contribute to a special issue, an access code has been sent to you by e-mail. The procedure is the same as for submitting an article, but you must first enter the access code in the corresponding field.

After entering the access code, the corresponding issue is displayed.

Finalise the submission procedure by clicking on “Submit this article”.

1.3.4 Request for modifications

After evaluation of the article, the author may receive a request for modification from the journal. The author is then invited to rework the article and submit a new version.

- Option 1: deposit of the reworked article in the open repository

Connect on HAL and go on the initial deposit. Click on the button “+ Deposit a new version” in the right hand side.
Once the new version has been moderated, log in to Episciences and go to the article’s page. In the “Revision requests” section, in “Answer this request”, select “Upload a new version”.
The document identifier and the repository of the submitted article are proposed by default. Indicate the new version to be taken into account.

The new version is sent for review.

- Option 2: Submit a temporary version (the modified version is not present in the repository)

This option is best used for minor modifications.

Log in to Episciences and go to the article’s page. In the “Revision requests” section, in “Answer this request”, select “Send a temporary version”.

Download the temporary version. A comment can also be added to specify the changes made to this version.
This version is only present on Episciences and not visible in the open repository. When the article is validated, the final version must be uploaded to the repository in order to obtain the status “accepted” (see option 1).

The published article can be consulted on the journal’s website. Its bibliographic references are automatically updated in the open repository.

In case of need, you can contact the technical support at the following address: support [at] episciences.org

### 1.4 Reviewer guidelines

**Rights:** Reviewer

#### 1.4.1 Invitation to review an article

The reviewer receives an invitation by e-mail. The message contains the title of the article, a link to the article in the open repository and a link to the response form allowing the reviewer to accept or reject the review.

The invitation is time-limited: the response time is specified in the e-mail.

By clicking on the link, the response form to the invitation is displayed:
1.4.2 Decline the invitation

To decline the invitation, click on “I don’t want to review this article”.

It is then possible to suggest the name of another reviewer and to specify the reasons for the refusal.
In some cases, the journal may ask to declare whether the reviewer has competing interests with the article under review. If this is the case, it is considered a reason for rejection.

Click on “Confirm my refusal” to save the answer.

A “I’ve changed my mind!” button allows you to return to the invitation response form.

1.4.3 Accept the invitation

After clicking on “I agree to review this article”, an email is sent to the reviewer allowing him/her to access the evaluation of the article on the site.

1.4.4 Connexion

Log in with your username and password on the journal’s website.

Note: it is not necessary to open several accounts on Episciences if the reviewer is requested by several journals hosted on the platform.

1.4.5 Dashboard

The dashboard displays the current actions on the site: reviews but also articles if the user has submitted any.

Click on “Rate articles” to access the articles.
The “My reviewings” page lists the articles for which the user has received an invitation. Each article has a status: pending reviews appear at the top of the table. The user can filter by article status, review status, volume, section, editors, DOI and repositories.

### My reviewings

![List of articles to review](image)

**Filters**

- **Article status**
  - All
  - Abandoned
  - Accepted
  - Accepted - final version submitted, waiting for formatting by copy editors

- **Progression of my reviewing**
  - All
  - Pending reviewing
  - Reviewing in progress
  - Completed reviewing

- **Volume**
  - All
  - Volume Title
  - Volume 1
  - Volume 2

- **Section**
  - All
  - Rubrique 1A
  - Rubrique 2
  - SECTION 1

- **Editors**
  - All
  - None
  - Chief Editor

- **Reviewers**
  - All
  - None

- **DOI**
  - All
  - None
  - With

- **Repositories**
  - All
    - arXiv
    - Episciences
    - Hal

  ![Filter these articles](image)

### 1.4.6 Processus

By clicking on the title of the article, a new page opens to access the article to be reviewed and the form to be filled in for the evaluation.

There are two ways to access the article:

1. **Download the file**,
2. **Visit the article page**: allows you to consult and download the article on the open archive site where it has been deposited. There may be several versions of the text, as well as annexed documents (dataset, video file, slide show, etc.).
Filling in the rating grid

Each journal has its own rating grid, the different criteria of which consist of scores or items to be selected from a drop-down menu.

Depending on the journal, the reviewer can complete the grid with a comment and upload a file for the author: this file can be the annotated article, or any information that the reviewer seems useful to communicate to the author.

The exchanges between the reviewer and the author are saved on the platform. By default, the reviewer is anonymous. If he/she wishes, he/she can lift the anonymity by adding his/her name in the “Comment” space.

Validation of reviewing

During the assessment, two options are available:

1. **Save evaluation**: save the information entered during the review if the review is not completed.

2. **Complete the evaluation**: allows you to validate the information entered and to send it to the editor in charge of the article.
1.5 Copy editing

Rights: Author, Copy editor

Copy editing is a step that takes place after the article has been accepted. This stage allows you to entrust the final formatting either:

• to a person with a dedicated role (copy editor);
• to the author.

Copy editing can also be done by the following roles:

• administrator
• editor in chief
• editorial secretary
• editor (for their assigned articles)

1.5.1 The role of the copy editor

The copy editor role can be assigned to one or more people. To add this role to one or more users, go to: Journal management > Users > List.

The person with the copy editor role should then be added to the articles on which they have to work.
1.5.2 Activity of the copy editor

The first choice to be made on an accepted article is to select the type of workflow desired:

- **Option 1**: the journal does the formatting. The author provides the sources to the copy editor who will edit the final version;

- **Option 2**: the author formats the final version themself.
Option 1: The journal takes care of the copy editing

Choose the option “Ask the author for the sources (copy editing by the journal)”. A window allows you to customise the message to be sent to the author to ask him/her to deposit their sources on the journal’s website.

As soon as the author has uploaded their sources, an e-mail is sent to the copy editor allowing them to retrieve the files from the site. If the files are not suitable, it is possible to request other sources from the author. To do this, in "Article status", select “Ask for the author’s sources again (To be formatted by the journal)”. If everything is correct, upload the files, proceed with the formatting and validate by selecting “Copy editing by the journal completed, ask for the final version”. This sends a message to the author.

The message contains a link allowing the author to submit, after deposit in the open repository, the final version of their manuscript which will then be published by the journal.
The work of copy editing is then complete.

**Adding sources by the author**

To upload the sources files, click on the “Add source files” button.

The predefined message can be changed.

Once you have selected the file(s), click on “Send” to send them. A summary of the e-mail and the files sent will be displayed.
If necessary, further shipments are possible with other files. Each time, a notification is sent to the copy editor.

**Option 2: The author takes care of the copy editing**

Choose the option “Ask for the final version (copy editing by the author)”. A window allows you to customise the message to be sent to the author. The message is pre-filled according to a template that can be customised by the journal, which automatically adds the information the author needs, as well as elements allowing the manuscript to be styled for its final version.

The information in the message should allow the author to have access to all the data needed to format the article.
Dear Name,

The editorial board requests you to format your article
#1596 - Title of the article
submitted on November 14, 2022.

Here are the bibliographical references of your article:

- Submission date: November 14, 2022
- Latest revision date: November 14, 2022
- Revision dates (if multiple versions): November 14, 2022; November 16, 2022; November 23, 2022
- Acceptation date: March 3, 2023
- Permanent identifier: 1596
- Section name: No section
- Volume name: 3
- Position in volume: 2
- Volume editor(s): None
- DOI: 10.12345/nameofthejournal.1596
- Current year: 2023
- Volume's bibliographical reference: None

The style files and the rules for preparing a document adapted to this style can be found at the following address: https://epi-preprod.episciences.org/public/epi-preprod_episciences.zip

Please do not yet submit the processed file to your archive, but wait until we have given you the green light for this final version.

To upload your formatted document, please go to: https://epi-preprod.episciences.org/paper/view/id/1596.

Sincerely yours,
**Important** The site administrator must have previously created a .zip archive (named according to the format: short_journal_title.zip) in the “Resources” directory (Journal management > Website > Resources). This archive contains the files to be used for the formatting, for example the different graphic elements, the style sheet, etc.

C’est ensuite à l’auteur de téléverser ses sources.

**Uploading of formatted version by the author**

The author uploads their formatted version to the site.

Once the file has been selected, click on “Send” to send it. A summary of the e-mail and the file sent is displayed.

If necessary, other subsequent transmissions are possible with other files. Each time, a notification is sent to the copy editor.

The copy editor receives an email notification when the author has uploaded their formatted version. It is then possible to proceed to the stage of accepting the author version or requesting another formatted version.

**Acceptance**

If the submitted version is not suitable, the copy editor can contact the author to request changes.

If the version is suitable, accept the author’s version: in “Article status”, select “Accept as final version”.

This sends a message to the author to deposit this validated version on the open repository.

The message also contains a link allowing the author to submit, after deposit in the open repository, the final version of their manuscript which will then be published by the journal.

The work of copy editing is then complete.

**1.6 Managing the website**

**Rights**: Administrator, Editor in Chief, Editorial secretary, Webmaster

The design of the website can be customised to give the journal a specific visual identity.

To customise the journal, go to: Journal management > Website.

Six configurable options are available:

- **General**: define the interface languages (English and/or French);
- **Style**: define the display options of the site;
- **Header**: add a banner;
- **Menu**: create and manage information pages (ethical charter, publishing policies, evaluation process, credits, etc.);
- **News**: add specific information (calls for papers, conference announcements, reviews of the journal, etc.);
- **Resources**: storage of the various text and image files of the site (e.g. logos, banner, copyright assignment contract, etc.).
1.6.1 General

The “General” option allows you to define the interface languages. Currently, there are two possible choices: French and English.

Select the desired languages by clicking on their labels (click and press Ctrl or Cmd to select the second language, if your site is bilingual).

Click on “Save” to save the chosen settings.

Please note: if you choose to implement both languages, you will need to translate the entire interface into these two languages (titles and contents of the pages you have created).

1.6.2 Style

The “Style” option allows you to define the display of the site. You can choose:

- the orientation of the menu (horizontal or vertical);
- the width of the main zone;
- the display or not of the breadcrumb trail;
- the type of customisation (one-click, simple or advanced).

Menu orientation

You can choose between a vertical menu (which is displayed on the left of the page) or a horizontal menu (which is displayed at the top of the page, below the title bar). You can also choose the “folded” option for each of these two orientations.
Width of the main zone

Two possibilities are proposed here:

- Default (fixed 940px);
- Responsive (adjusted to the screen side).

Show breadcrumb trail

The breadcrumb trail makes it possible to know at any time which page of the site you are on.

The breadcrumb trail is displayed at the top of the page either directly under the banner (in the case of a vertical menu) or under the menu (in the case of a horizontal menu).

Customisation type

There are three ways to customise your site: one-click, simple or advanced.

By selecting the “1-click” option, you can choose between two predefined templates (template 1 and template 2).

By selecting the “Simple” option, you can configure the background colours of the page, the colours of the main area, the text and links, choose the font and size of the text, titles, etc.
By selecting the “Advanced” option, you can directly edit the CSS.

You can call on the Episciences team to help you choose the right fonts and colours to make your site accessible.

1.6.3 Header

The “Header” option allows you to customise the banner. Here you can upload files (images, logos, etc.) that will appear in the header of the site.

Click on the “Add a logo” button. If you wish to enter a text in the header, select “Text” in the drop-down menu of the “Type” field. Enter the title of your magazine and its alignment (left, centered or right). If your site is bilingual, remember to specify the title in both languages.

If you have chosen advanced customisation, you can add a style by specifying the CSS classes and styles to be assigned to the title.
If you wish to add an image, select “Image” from the drop-down menu in the “Type” field and upload the file after selecting it with “Browse”.

Click on “Save” to save the settings.

1.6.4 Menu

The “Menu” option allows you to create and manage the pages of the site, especially the information pages. There are nine types of pages:

- **Homepage**: a single page, homepage of the site;
- **Custom page**: to create information pages (ethical charter, publishing policies, evaluation process, credits, etc.);
- **Link**: to create a link to an external page (e.g. the publisher’s site, Episciences documentation, etc.);
- **File**: to display a document in the browser or to link it to a page;
- **News**: allows you to add specific information;
- **RSS feed**: allows you to obtain the latest published articles (papers.rss);
- **Browse by**: author, by date, by section, all volumes, latest articles, etc.
• **Search an article**: form to search for an article on the site;

• **Editorial Staff members**: page that automatically generates the list of members according to their role in the site.

**Create a page**

To create a page, select its type from the drop-down menu and then click on the “Add page” button.

**Menu**

Give your page a short title: this will act as a permalink and will appear in the URL.

If your site is bilingual, remember to specify the title of the page in both languages.

If you enter “contact” in the “Permanent link” field, the page name will be: journalsname.episciences.org/contact

You can decide whether the pages are public, private (Members only) or only visible to certain roles (Custom).

**Create a folder**

It is possible to create folders to group several pages together. To create a folder, click on “Add folder”.

If your site is bilingual, remember to specify the title of the folder in both languages.

An example of a menu where the different pages have been organised into folders: “The journal” for the pages presenting the functioning of the publication (Editorial line, Committees, Operating charter, Evaluation process, etc.).
“Contribute” for the pages intended for authors wishing to publish in the journal (Ethical charter, Submission procedures, Recommendations to authors, etc.) and “Information” for the pages presenting the general presentation of the journal (Calls for contributions, Publication policies, Credits).

<table>
<thead>
<tr>
<th>Actions</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="icon" alt="Home" /></td>
<td>Home</td>
</tr>
<tr>
<td><img src="icon" alt="Search" /></td>
<td>Search an article</td>
</tr>
<tr>
<td><img src="icon" alt="Latest" /></td>
<td>Latest articles</td>
</tr>
<tr>
<td><img src="icon" alt="Volumes" /></td>
<td>Volumes</td>
</tr>
<tr>
<td><img src="icon" alt="Authors" /></td>
<td>Authors</td>
</tr>
<tr>
<td><img src="icon" alt="Year of publication" /></td>
<td>Year of publication</td>
</tr>
<tr>
<td><img src="icon" alt="The Journal" /></td>
<td>The Journal</td>
</tr>
<tr>
<td><img src="icon" alt="Editorial Staff members" /></td>
<td>Editorial Staff members</td>
</tr>
<tr>
<td><img src="icon" alt="Editorial board" /></td>
<td>Editorial board</td>
</tr>
<tr>
<td><img src="icon" alt="Expertise procedure" /></td>
<td>Expertise procedure</td>
</tr>
<tr>
<td><img src="icon" alt="Rating Grid" /></td>
<td>Rating Grid</td>
</tr>
<tr>
<td><img src="icon" alt="Contribute" /></td>
<td>Contribute</td>
</tr>
<tr>
<td><img src="icon" alt="Ethical Charter" /></td>
<td>Ethical Charter</td>
</tr>
<tr>
<td><img src="icon" alt="Instructions for authors" /></td>
<td>Instructions for authors</td>
</tr>
<tr>
<td><img src="icon" alt="Informations" /></td>
<td>Informations</td>
</tr>
<tr>
<td><img src="icon" alt="Publishing policies" /></td>
<td>Publishing policies</td>
</tr>
<tr>
<td><img src="icon" alt="Credits" /></td>
<td>Credits</td>
</tr>
</tbody>
</table>

1.6. Managing the website
1.6.5 News

The “News” option allows you to add information to the news page. This page must have been created beforehand in the menu.

To add a news item, click on the “Add news” button.

The news entry form has four fields. Fields marked with an asterisk are required.

- **Title**: title of your news item;
- **Content**: description of the news item;
- **Link**: url of the page where you can get more information;
- **Status**: Invisible / Online. The invisible status allows you to unsee the news without deleting it (to keep it in archives for example).
News

Publishing another way: the epic of Episciences and overlay journals

In order to celebrate ten years of Episciences, we organise a meeting on the 30th and 31st of March 2023 about the platform, the journals it hosts and about editorial models.

posted on 2023-03-09 11:51:24 by Céline Barthonnat

1.6.6 Resources

The “Resources” option lists all the resources (text files, images, etc.) deposited on the site.

Resources

The table below lists all visible resources stored on the website. You can view them in a new tab, locate their url or delete them.

<table>
<thead>
<tr>
<th>Files</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>epl_presprod_episciences.zip</td>
<td></td>
</tr>
<tr>
<td>old_light_bulb_sign.jpg</td>
<td></td>
</tr>
<tr>
<td>sand.png</td>
<td></td>
</tr>
<tr>
<td>style.css</td>
<td></td>
</tr>
</tbody>
</table>

1.7 Journal settings

Rights: Administrator

To customize the journal settings, go to the menu: Journal management > Journal > Settings.

Fields marked with an asterisk are required.
1.7.1 General settings (displayed in the footer)

<table>
<thead>
<tr>
<th>Setting</th>
<th>Expected format</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISSN (online)</td>
<td>1234-5678</td>
<td>1234-5678</td>
</tr>
<tr>
<td>ISSN (print)</td>
<td>1234-5678</td>
<td>5678-1234</td>
</tr>
<tr>
<td>Your journal’s DOI</td>
<td>To be filled if the journal has a DOI</td>
<td></td>
</tr>
<tr>
<td>Journal contact URL</td>
<td>URL</td>
<td></td>
</tr>
<tr>
<td>Journal technical contact URL</td>
<td>URL</td>
<td></td>
</tr>
<tr>
<td>Journal contact email</td>
<td>E-mail Address</td>
<td></td>
</tr>
<tr>
<td>Journal technical contact email</td>
<td>E-mail Address</td>
<td></td>
</tr>
</tbody>
</table>

- **ISSN (online)**: To be completed with the e-ISSN of the journal (XXXX-XXXX)
- **ISSN (print)**: To be completed with the ISSN of the journal (XXXX-XXXX)
- **Your journal’s DOI**: To be filled if the journal has a DOI
- **Journal contact URL**: Enter a URL here
- **Journal technical contact URL**: Enter a URL here
- **Journal contact email**: Enter an e-mail address here
- **Journal technical contact email**: Enter an e-mail address here
1.7.2 Submission parameters

Repositories*: Select the repository(ies) available(s) for article submission. To select more than one: hold down the Ctrl key and click.

Other parameters can be activated:

Section choice:

• Contributors can’t choose a section;
• Contributors can choose a section;
• Contributors have to choose a section.

Editor selection:

• Contributors can’t choose editors;
• Contributors can choose editors;
• Contributors have to choose editors;
• Contributors have to choose one and only one editor.

When the author has the option to propose an editor at the time of submission, it is possible to select this option: “Do not allow the selection of an editor in chief”.

It is also possible to allow contributors to:

• suggest reviewers (this parameter does not automatically assign the manuscript to a reviewer, it is only a suggestion);
• specify unwanted reviewers;

Repositories*: Select the repository(ies) available(s) for article submission. To select more than one: hold down the Ctrl key and click.
• answer revision requests with a temporary version;
• choose the volume;
• submit a previously denied article again (new version);
• abandon the publication process.

A new option allows the author to delegate to the journal the updating of their submission published on arXiv:
• Contributors can share arXiv paper password: No/Optional/Required.

### 1.7.3 Rating settings

<table>
<thead>
<tr>
<th>Rating settings</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delay before invitation expires</td>
<td>6 month(s)</td>
</tr>
<tr>
<td>Default rating delay</td>
<td>3 month(s)</td>
</tr>
<tr>
<td>Minimum rating delay</td>
<td>4 week(s)</td>
</tr>
<tr>
<td>Maximum rating delay</td>
<td>12 month(s)</td>
</tr>
</tbody>
</table>

- Reviewers can send messages to the author

**Concerns only published articles**
- Display rating reports on the article’s consultation page

**Automatically reassign the same reviewers when a new version is submitted:**
- In the event of a request for major modifications
- In the event of a request for minor modifications

For each option, indicate a number of day(s)/week(s)/month(s).

- **Delay before invitation expires**
- **Default rating delay***: Delay before the reviewer has to send the rating report. The deadline is calculated from the date when the invitation was sent.
- **Minimum rating delay***: When handling an article, editors can set a custom rating delay for each reviewer. This delay cannot be lesser than the Minimum rating delay.
- **Maximum rating delay***: When handling an article, editors can set a custom rating delay for each reviewer. This delay cannot be greater than the Maximum rating delay.

Automatic dunning is calculated from these parameters.

Others options:
• Reviewers can send messages to the author;
• Display rating reports on the article’s consultation page (this option concerns only published articles).

Automatically reassign the same reviewers when a new version is submitted:

• In the event of a request for major modifications;
• In the event of a request for minor modifications.

1.7.4 Editors settings

Editors settings

Minimum ratings count: indicate here the minimum number of reviews before an article can be accepted.

Others options:

• Encapsulate editors: Encapsulated editors can only see articles assigned to them.
• Editors can accept articles
• Editors can publish articles
• Editors can refuse articles
• Editors can ask for article revisions
• Editors can edit the journal mail templates

When an article is submitted, assign the:

• Editors in Chief
• Section editors
• Volume editors (except special volume)
• Suggested editors
• Special volume editors
• Editors can abandon the publication process

Minimum ratings count: indicate here the minimum number of reviews before an article can be accepted.

Others options:

• Encapsulate editors: Encapsulated editors can only see articles assigned to them.
• Editors can accept articles
• Editors can publish articles
• Editors can refuse articles
• Editors can ask for article revisions
• Editors can edit the journal mail templates

When an article is submitted, assign the:
• Editors in Chief
• Section editors
• Volume editors (except special volume)
• Suggested editors
• Special volume editors
• Editors can abandon the publication process

1.7.5 Notification settings

Enable emails to be sent to certain roles (administrators, editors in chief, editorial secretaries) when an article is submitted, updated or rejected.

1.7.6 Special issues settings

Allows you to assign an access code to enable submission in special volumes and also to partition the reviewers of a special volume.

1.7.7 Copy editing

Allows partitioning of copy editors, i.e. giving them access only to items assigned to them.

1.7.8 Additional settings

• Allows reviewers to declare a conflict of interest (COI) before the assessment.
• Allows you to change certain things on an already accepted article.
• Statistics visibility: hidden (default option)/public/administrators only
• Redirection address: Select the address that will receive the failed emails.

1.8 Volumes and sections

Rights: Administrator, Editor in Chief, Editorial secretary

It is possible to create volumes and sections.

Volumes are similar to journal issues and can be used to collect thematic articles.
1.8.1 Volumes

To create and manage volumes, go to the menu: Journal management > Journal > Volumes.

Several volumes may be open at the same time. Authors may submit to any open volume. Before publication, the editor may change the volume of an article.

An article cannot be submitted to a closed volume.

After publication, an article cannot be assigned to another volume.

To create a volume, click on “Create a new volume”.
A volume is composed of 7 elements:

- **Name** (required field): title of the volume
- **Description**: description of the volume
- **Volume’s bibliographical reference**: indicate here the identifier of the volume (e.g. 18 ; vol. 2 ; vol.24:1). This reference is used in the mail templates.
- **Status** (open/closed): an open status allows articles to be added as they come in.
- **Current volume** (yes/no): by selecting the “yes” option and the “open” status, this volume is proposed at the time of submission
- **Special issue** (yes/no): volume accessible only by access code
- **Metadata**: allows you to add a PDF file, such as an editorial, an erratum, an addendum, thanks, a tribute, etc.

If the journal site is in multiple languages, the volume name and its description must be entered for each language. Click on + to display the field.
1.8.2 Special issue

The operation of a special issue is linked to the special issue settings defined in Journal > Settings > Special issues settings:

- **Restrict submission in special issues with an access code**: if the item is ticked, an access code is associated with the volume. This code is sent to contributors to invite them to submit an article in the special volume.

- **Encapsulate reviewers**: if the item is ticked, the reviewers of a volume will not be visible elsewhere in the journal. A partitioned reviewer is a reviewer who is only allowed to review articles for the special volume. The proofreader will only see articles that are tagged to the special volume and not other articles in the journal.

- **Editors can reassign handled articles to another editor**: an editor, to whom the editor-in-chief has assigned the management of an article, can designate other editors.

To create a special issue, go to the menu: Journal management > Journal > Volumes then “Create a new volume”. Fill in the details and select “Yes” for “Special issue”.

If in Journal > Settings > Special issues settings you have selected the item “Restrict submission in special issues with an access code”, the code is displayed in the list of volumes.
This code is sent to contributors inviting them to submit an article to the special issue.

### 1.8.3 Sections

To create and manage sections, go to the menu: Journal management > Journal > Sections.

Several sections can be open at the same time. An author can submit an article to any section.

During the proofreading process, an article may be assigned to another section by the editor (not possible after publication).

An article cannot be submitted to a “closed” section.

The number of sections is not limited.

To create a section, click on “Create a new section”.

---

**Volumes**

<table>
<thead>
<tr>
<th>Title</th>
<th>Editors</th>
<th>Special</th>
<th>Current</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volume Title</td>
<td></td>
<td></td>
<td>Yes</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>Volume 1</td>
<td></td>
<td></td>
<td></td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>Volume 2 (access code: 61b9e59f6e9368)</td>
<td></td>
<td></td>
<td>Yes</td>
<td>Closed</td>
<td></td>
</tr>
<tr>
<td>Volume 3</td>
<td></td>
<td></td>
<td>Yes</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>Special issue (access code: 6129537c4c49)</td>
<td></td>
<td></td>
<td>Yes</td>
<td>Open</td>
<td></td>
</tr>
</tbody>
</table>
The metadata of a section:

- **Name** (required field): title of the section
- **Description**: will not be displayed on the site
- **Status**: open/closed

If the journal site is in multiple languages, the section name and its description must be entered for each language. Click on + to display the field.

## 1.9 Managing users

Rights: Administrator, Editor in Chief, Editorial secretary

To manage the users of the journal (create an account, add roles, etc.), go to the menu: Journal management > Users > List.

**Good practice**

Before creating an account for a new user, please check that the user does not already exist in the user database. To check that the user does not already have rights in the journal, enter the person’s name in the search field at the top right of the user list.
List

Guidelines

Before creating an account for a new user, please check that he/she does not already exist in the userbase.

1. Check that the user is not already enrolled in the journal. Enter the surname of the person in the search box located in the top right corner of the journal's user list.
2. If the search has not returned any hit, check that the user has not already an account on HAL. Please enter the surname of the person in the search box next to the «add a user» button. You will be able to browse the HAL userbase.
3. If the search has not returned any answer, you can create an account for the person using the «create an account» button.

Add a new user

Search a user

Add Create a new account

It is possible to invite new users (authors, reviewers or editors) to the journal site. To do this, enter the name of the user to be added in the dedicated field. If the search does not return any results, it is possible to create an account for the user by clicking on the “Create a new account” button.
Create account

* Required fields

**Login**
Can not be changed later. At least 3 chars.

**Password**
Minimum is 7 characters

**Password (confirm)**
Confirm your password

**Last Name**

**First Name**

**Screen Name**

**ORCID**
Please enter your ID (16 digits), for example 0000-0001-2345-6789, if you already have one

0000-0001-2345-6789

**Affiliation(s)**
Please enter the name or acronym of your organization

**Twitter username or Mastodon**
Enter your Twitter account (e.g. @anonymous) or Mastodon account (e.g. @username@server)

@anonymous or @username@server

**Web Site(s)**
Please enter the websites you wish to add

**Default Language**
English

**E-mail**
anonymemail@example.org

Required fields for account creation:

- **Login**: at least 3 characters. Attention: the login cannot be changed once the account has been created.
- **Password**: minimum 7 characters
- **Password (confirm)**
- **Last Name**
- **First name**
- **E-mail**: indicate here a valid email address, a confirmation email will be sent to validate the account creation

It is recommended that users create their own account (choice of login and password). Once the account is created, the user can be selected from the list.

1.9. Managing users
By default, all users have the rights of member, which allows them to submit an article. Other rights can be added by the editor.

To add one or more rights, go to the “Rights” column and select the rights from the list.

### 1.10 Rating grids

**Rights**: Administrator, Editor, Editor in Chief, Editorial secretary

A proofreading grid can be developed to guide proofreaders through a series of predefined points to be examined. The results of the reviews can then be standardised.

To build a rating grid, go to the menu: Journal management > Journal > Rating Grids.

A rating grid is composed of a name and a set of criteria.
### 1.10.1 Default grid

#### Rating Grids

<table>
<thead>
<tr>
<th>Criterion</th>
<th>Coeff.</th>
<th>Comments</th>
<th>Upload</th>
<th>Rating</th>
<th>visibility</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>General appreciation</td>
<td>5</td>
<td>Yes</td>
<td>Yes</td>
<td>Quantitative rating (out of 5)</td>
<td>Public</td>
<td>Edit</td>
</tr>
<tr>
<td>Quality</td>
<td>-</td>
<td>No</td>
<td>No</td>
<td>Separator</td>
<td>Public</td>
<td>Remove</td>
</tr>
<tr>
<td>Writing quality</td>
<td>2</td>
<td>Yes</td>
<td>No</td>
<td>Quantitative rating (out of 10)</td>
<td>Contributor</td>
<td>Edit</td>
</tr>
<tr>
<td>Bibliography</td>
<td>-</td>
<td>Yes</td>
<td>No</td>
<td>Qualitative rating (customized)</td>
<td>Contributor</td>
<td>Edit</td>
</tr>
<tr>
<td>Interest of the subject</td>
<td>-</td>
<td>No</td>
<td>No</td>
<td>Separator</td>
<td>Public</td>
<td>Remove</td>
</tr>
<tr>
<td>Innovative</td>
<td>3</td>
<td>Yes</td>
<td>No</td>
<td>Quantitative rating (out of 5)</td>
<td>Editors</td>
<td>Edit</td>
</tr>
<tr>
<td>Irrelevant</td>
<td>5</td>
<td>Yes</td>
<td>No</td>
<td>Qualitative rating (customized)</td>
<td>Editors</td>
<td>Edit</td>
</tr>
</tbody>
</table>

A proofreading grid is proposed by default. Other grids can be added, depending on the needs, for example to distinguish between current volumes and conference proceedings volumes.

The default grid can be modified. Each criterion can be modified or deleted.

### 1.10.2 Add criterion

A proofreading grid is composed of as many criteria as necessary. To define a criterion, click on “Add criterion”.

1.10. Rating grids 49
Fields marked with an asterisk are required:

- **Name**: if the journal site is in several languages, the name must be entered for each language. Click on + to display an additional field.

- **Description**: to be used to define the criteria proposed to the reviewers. If the journal site is in several languages, the description must be entered for each language. Click on + to display an additional field.

- **Criterion visibility**: select Public/Contributor/Editors. By default, the criterion is only visible to editors.

- **Evaluation type**: the evaluation can be quantitative, qualitative or free. If “Qualitative” or “Free” is selected, “yes” should be selected in the “Comments” field or in “File upload”.

- **Comments**: yes/no. If “yes” is selected, the reviewer can add a comment on this criterion.

- **File upload**: yes/no. If the choice is “yes”, the reviewer can upload the original annotated text.

- **Coefficient**: a coefficient can be assigned to the criterion. The highest number corresponds to the highest weighting level. The sum of the coefficients of the different criteria will determine a final score.

- **Rating type**:
  
  – when the selected evaluation type is “Quantitative”, three types of scoring are proposed (scoring out of 10, out of 5 or personalised);
  
  – when the selected evaluation type is “Qualitative”, it is possible to choose between a “standard rating (yes, no, maybe)” or a “customized rating”. For the latter, different values can be added, e.g. poor, average, good, excellent.

Once the fields have been completed, click on “Validate” to save the criteria.
1.10.3 Add a separator

To organise the criteria of the grid, one or more separators can be added. The separators allow you to structure the grid in different parts, for example: “Quality”, “Interest of the subject”, etc. To create a separator, click on “Add a separator”.

Add a separator

* Required fields

Name *

Description

Criterion visibility

Fields marked with an asterisk are required:

- **Name**: if the journal site is in several languages, the name must be entered for each language. Click on + to display an additional field.
- **Description**: if the journal site is in several languages, the description must be entered for each language. Click on + to display an additional field.
- **Criterion visibility**: select Public/Contributor/Editors. By default, the criterion is only visible to editors.

Once the fields have been completed, click on “Validate” to save the separator.

1.10.4 View the grid

By clicking on “View this Grid”, the grid as it will be proposed to the reviewers is displayed.
A coloured icon indicates the visibility of the criterion:

- red: the answer to this criterion can be seen publicly on the article page;
- orange: the answer to this criterion can be seen by the author;
- grey: the answer to this criterion can only be seen by the editors.
1.11 Automatic reminders

Rights: Administrator, Editor, Editor in Chief, Editorial secretary

To create and set up the reminders, go to: Journal management > Mail > Automatic reminders.

The automatic dunning process is based on:

- The deadlines set for the journal (see Journal management > Journal > Settings : Notification Settings);
- Reminder settings.

Three types of reminder are available:

1. **Unanswered proofreader invitation**: to remind a proofreader who has not responded to an invitation;

2. **Reminder before proofreading delivery date**: to remind a proofreader who has accepted the invitation of the deadline;

3. **Reminder after proofreading delivery date**: allows you to remind a proofreader who has accepted the invitation but who has missed the deadline.

To set up, click on “Add a new reminder”. A screen appears with a list of parameters to be defined for the desired dunning types.
Fields marked with an asterisk are required.

- **Type**: Select the type of dunning from the drop-down list. You can choose from the following:
  - Unanswered reviewer invitation
  - Reminder before reviewing deadline
  - Reminder after reviewing deadline
  - Reminder before revision deadline
  - Reminder after revision deadline
  - Not enough reviewers
  - Article blocked in accepted state

- **Recipient**: Select the relevant role from the drop-down list. You can choose one of the following:
– Editor in Chief
– Editor
– Reviewer
– Author

• **Delay**: enter a number corresponding to the number of days (the reminder will be sent X days after the deadline set in the journal).

• **Repetition**: select the frequency of the reminders from the drop-down list. Choice of:
  – Never
  – Daily
  – Weekly
  – Every two weeks
  – Monthly

• **Customization**: select “Default template” (cannot be changed) or “Custom template” in order to be able to change the subject of the mail and the text of the message.

Click on “Submit” to save your changes. An automatic dunning is created. It is possible to modify it.
Automatic reminders

- Unanswered reviewer invitation - editor copy (1 day)
- Unanswered reviewer invitation - reviewer copy (1 day)

- Reminder before reviewing deadline - reviewer copy (14 days)
- Reminder before reviewing deadline - editor copy (14 days)

- Reminder after reviewing deadline - editor copy (1 day)
- Reminder after reviewing deadline - reviewer copy (7 days)
- Reminder after reviewing deadline - editor copy (7 days)

- Reminder before revision deadline - editor copy (14 days)
- Reminder before revision deadline - author copy (14 days)
- Reminder before revision deadline - author copy (1 day)
- Reminder before revision deadline - editor copy (1 day)

- Reminder after revision deadline - editor copy (1 day)
- Reminder after revision deadline - author copy (1 day)
- Reminder after revision deadline - author copy (7 days)
- Reminder after revision deadline - editor copy (7 days)

- Not enough reviewers - editor copy (14 days)

- Article blocked in accepted state - copie destinée au rédacteur en chef (1 day)

Automatic reminders are sent every day at 00:00.
The messages can be viewed in the mail history: Journal management > Mail > History.

1.12 Mailing module

Rights: Administrator, Editor, Editor in Chief, Editorial secretary, Webmaster
1.12.1 Mailing

To manage the sending of emails to certain roles, go to: Journal management > Mail > Mailing.

A message can be sent to a specific recipient or to a group of recipients selected according to their role in the journal. The selectable roles are: editor in chief, editors, guest editors, editorial secretary, webmasters, proofreaders.

To select the recipient(s), click on “To”, “Cc” or “Bcc” and then on “All contacts”.

Authorized extensions: png, jpg, jpeg, gif, tif, tiff, zot, gzi, rar, tar, bz2, zip, doc, eps, ps, dvi, docx, pdf, txt, md, html, css, odt, ods, xls, xlsx, txt, bnf, dbx, bdb, bsd, txt, cbl, cif, def, dbx, dso, fox, sty
Maximum file size you can Upload: 10 MB

Attachments

Send
1.12.2 Templates

A number of pre-configured emails (templates) are available on the site.
To consult and modify these templates, go to: Journal management > Mail > Templates.
## Templates

### Paper - Abandon publication process
- Abandon publication process (author copy)
- Abandon publication process by author (author copy)
- Abandon publication process (editors copy)
- Abandon publication process (case where editor was not assigned)
- Abandon publication process - Reviewer removal

### Paper - Continue publication process
- Continue publication process (author copy)
- Continue publication process (editors copy)

### Paper - comments
- Reviewer's comment about a paper (author copy)
- Reviewer's comment about a paper (editors copy)
- Author's answer to a reviewer's comment (reviewer copy)
- Author's answer to a reviewer's comment (editors copy)
- Editor's comment about a paper (editors copy)

### Paper - copy editing
- Assign a copy editor (copy editor copy)
- Assign a copy editor (editors copy)

To modify a template, click on the “Edit” button.
The name of the template, its subject and its content can be customised.
To customise the templates, see the list of variables to be inserted in the templates.
1.12.3 History

All messages sent via the site (automatic notifications as well as emails), are accessible via the history available in Journal management > Mails > History.

By default, exchanges are displayed by date sent, with the most recent exchanges displayed first.