OJS Dataverse Plugin Guide
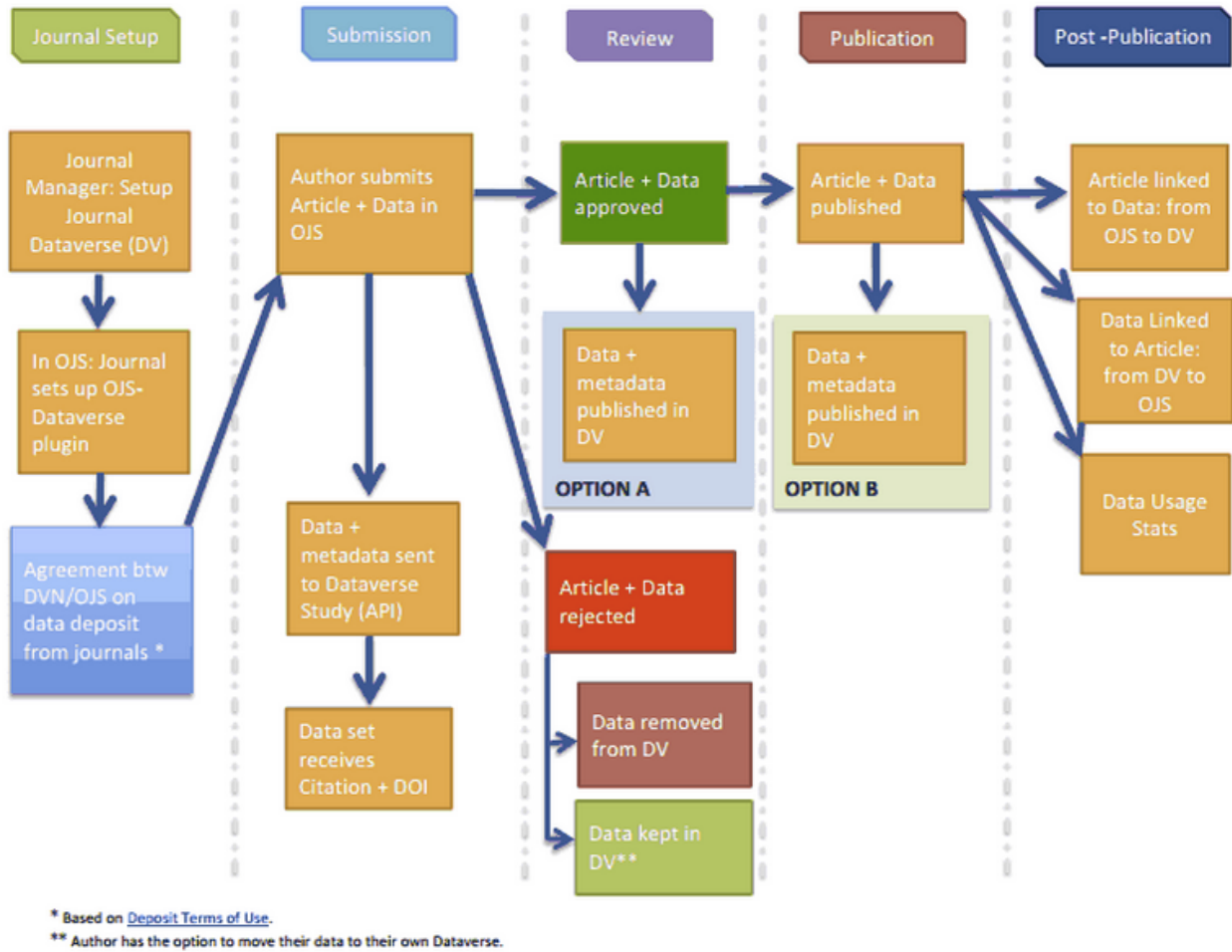

Fig. 1 High Level Dataverse Plugin Data Publication Workflow

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Section I: Plugin Configuration

IF USING OJS 2.4.2, please note that OJS bug 8154
(http://pkp.sfu.ca/bugzilla/show_bug.cgi?id=8154) has cropped up a number of times during our internal testing due to the nature of the testing workflow. This bug has been fixed upstream in OJS 2.4.4+, but testers using their own installs of OJS 2.4.2 are encouraged to apply the patch
(https://github.com/pkp/ojs/commit/35edda89d8f89586c1bbc0dbcc298c6af4eb75a1.diff)
before testing to prevent any issues. You will also need to *remove* the ojs/plugins/generic/sword folder that is in OJS by default -- please pay attention to the README!

Step 1: OJS version-based Dataverse plugin setup:

A. **OJS: Pre 2.4 (2.2 to 2.3.x)**
   1. Setup a Dataverse for your journal (more information: http://thedata.org)
   2. Setup OJS Dataverse plugin: Need to install manually on the server since the plugin install GUI was only added in 2.4+
      i. Download the plugin for your version of OJS.
      ii. Copy "dataverseplugin.tar.gz" to the server and extract it to plugins/generic/dataverse (the easiest way to do this is by using scp and tar -xzf, but you should probably consult your sysadmin).

   iii. Create database tables used by the plugin. From the OJS install directory, run the following command: php tools/dbXMLtoSQL.php -schema execute plugins/generic/dataverse/schema.xml

   iv. Then, as Journal Manager, navigate to "System Plugins" from USER HOME, then go to "Generic Plugins," where you should see Dataverse Plugin listed. Click "ENABLE" and follow configuration steps in **Step 2**.

B. OJS 2.4.0-2.4.3

  1. Setup a Dataverse for your journal (more information: http://thedata.org)

  2. Setup OJS Dataverse plugin in your Journal: v.2.4+ allows Journal Managers to install plugins without needing server access.

   i. Download the plugin for your version of OJS to your computer.

   ii. As Journal Manager, navigate to "System Plugins" from USER HOME. Click "Install a New Plugin" and upload Dataverse plugin from your computer using the form.

   iii. Go to "Generic Plugins," where you should see Dataverse Plugin listed. If it is not already enabled, click "ENABLE." Then follow configuration steps in Step 2 "General Plugin Setup" below.

C. OJS 2.4.4+

The dataverse plugin is automatically installed; proceed with Plugin Setup below.

DRIVER

The DRIVER plugin extends the OAI-PMH interface according to the DRIVER Guidelines 2.0, helping OJS journals to become DRIVER compliant.
ENABLE UPGRADE PLUGIN DELETE PLUGIN

Thesis Abstracts

Solicit and publish thesis abstracts.
ENABLE UPGRADE PLUGIN DELETE PLUGIN

Dataverse Plugin

Deposit data sets and/or other supplementary files to a Dataverse.
ENABLE UPGRADE PLUGIN DELETE PLUGIN

Thesis Abstracts Feed Plugin

This plugin produces RSS/Atom web syndication feeds for thesis abstracts.
ENABLE UPGRADE PLUGIN DELETE PLUGIN

Step 2: General Plugin Setup (see video for visual guide to setup)

1. After installing and enabling the plugin, begin with the "CONNECT" tab under the plugin heading. Input the URL of the Dataverse Network which you are connecting to (use the *main URL* such as **https://thedata.harvard.edu/dvn/**), as well as either a) username and password with administrative rights to this Dataverse, or b) a Dataverse API key, then click on "Save and Continue."

2. Next, go to the "SELECT DATAVERSE" tab. You should see a list of Dataverses within the linked Dataverse Network; select the one which will be tied to this OJS journal, and press "Save and Continue." If you do not see a list of Dataverses, please contact Eleni Castro (Research Coordinator, IQSS) at ecastro@fas.harvard.edu for assistance -- you need this part to work before moving forward with the setup!

3. Finally, go to the "SETTINGS" tab. The "SETTINGS" tab has four sections to configure settings related to the journal's data policies, terms of use governing the journal's Dataverse, data set metadata options, and workflow options.

   a. The "Data Policies" section includes a field to describe the journal's Data Availability Policy. Information entered here is available to journal readers in the "Policies" section of the journal's "ABOUT" page. Following the data availability policy field is a list of links to other journal policies, configured during journal setup, which may be edited to include data policy information as needed.

   b. The "Terms of Use" section offers the option of retrieving (i.e., copying) terms of use information from the Dataverse configured for the journal. Alternatively, you can choose to enter a new terms of use statement in the field provided. Terms of use are presented to authors when submitting data sets to the journal's Dataverse.

   c. The "Metadata Settings" section allows you to configure the format of an article's publication citation and persistent link ("Public identifier") displayed in the "Cataloguing Information" section of a Dataverse study. The public identifier type field displays a list of OJS Public Identifier plugins enabled for the journal (e.g., DOI). If none are enabled, cataloguing information will include a direct link to the article in OJS, once the article has been published.

   d. The "Workflow Settings" section allows you to toggle a) when OJS authors are asked to provide data sets, b) whether data sets are required, and c) the action that triggers the release of draft Dataverse studies: when a submission is accepted for publication, or when the submission is published.

Final Revision Plugin Testing

HOME   ABOUT   USER HOME   SEARCH   CURRENT   ARCHIVES

Home > User > Journal Management > **Dataverse Plugin**

Dataverse Plugin
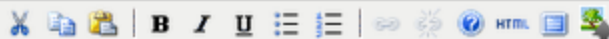
CONNECT   SELECT DATAVERSE   **SETTINGS**

Data Policies

Configure data policies.

Data Availability Policy

General data availability policy for the journal. This will appear in About the Journal.

> Final Revision Plugin Testing requires, as a condition for publication, that data supporting the results in the paper should be archived in an appropriate public archive. Final Revision Plugin Testing recommends the Harvard Dataverse, which is free and open to all researchers worldwide to share, cite, reuse and archive research data. Data are important products of the scientific enterprise, and they should be preserved and usable for decades in the future. Authors may elect to have the data publicly available at time of publication. Exceptions may be granted at the discretion of the editor, especially for sensitive information such as human subject data or the location of endangered species. Any exceptions should be documented in a statement in the public article. (Adapted from Joint Data Archiving Policy (JDAP)).

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Section Policies

Add data policies for specific journal sections.

- Articles

Author Guidelines

Edit Author Guidelines to include data submission and citation guidelines.

▸ Example author guidelines   Show example data submission and citation guidelines

Submission Preparation Checklist

Edit Submission Preparation Checklist to help authors comply with data submission and citation guidelines.

▸ Submission preparation checklist examples   Show example checklist items for submissions with datasets

Edit Review Guidelines to include instructions for reviewing datasets.

▸Example review guidelines   Show example guidelines for reviewing datasets

Copyedit Instructions

Edit Copyedit Instructions to include instructions for datasets.

▸Example copyedit instructions   Show examples of copyediting instructions for datasets

Terms of Use

Provide the terms of use to which users must agree before depositing data files.

○ Fetch terms of use from the Dataverse set up for this journal.
◉ Enter custom terms of use in the field below.

Here are some terms

Metadata Settings

Citation format | APA Citation Style ▾
*

Choose format of publication citation displayed in study cataloguing information.

Public identifier type | ▾

Choose type of public identifier to link to article from publication citation. If no public identifier plugins are enabled, citations for published articles will use OJS URLs.

Workflow Settings

Require data files | ☐ Require submissions to include data files deposited in Dataverse.

Release draft studies | Editor accepts submission ▾

Save Cancel

* Denotes required field

Step 3: Displaying the "Data Citation" block
Data citations for published articles are displayed in a content block in the left or right sidebar.

New England Journal of Coffee

HOME   ABOUT   USER HOME   SEARCH   CURRENT   ARCHIVES

Home > No 1 > **Author**

Author submission with supplementary files
Jen Author

Abstract

Author submits article with one or more supplementary files selected for deposit in journal's Dataverse.

Author edits metadata. Study cataloguing information is also updated.

Editor edits metadata. Study cataloguing information updated again.

Full Text:
PDF

KEYWORDS

keyword 1 keyword 2 keyword 3 keyword 4

USER

You are logged in as... **admin**
- My Journals
- My Profile
- Log Out

NOTIFICATIONS
- View (27 new)
- Manage

JOURNAL CONTENT
Search

[   ]

[All   ▼]

[Search]

Browse
- By Issue
- By Author
- By Title
- Other Journals

FONT SIZE

Section II :
Plugin Instructions for Authors, Editors, Reviewers and Readers

Instructions for Authors to Upload and Manage data sets with article submission

1. **New submissions**
   a. From the "USER HOME" tab, click the link under "Start a New Submission."
   b. Follow the submission process until "Step 3. Entering the Submission's Metadata." Submission metadata is used to populate the Dataverse study's cataloguing information.
   c. Proceed to "Step 4. Uploading Supplementary Files." Click the "Choose File" button to select a data file to upload, then click the "Upload" button. The resulting page, "Step 4a. Add a Supplementary File" provides fields to describe the uploaded file. If provided, keywords and filetype are included in cataloguing information when a Dataverse study is created for this submission. **In the section labelled "Dataverse," click the checkbox to indicate you agree with the terms of use and want to deposit the uploaded file in Dataverse upon completion of the submission. If the "Deposit file" option is not checked, the uploaded file will be saved as a supplementary file but will**

not be deposited in Dataverse.

d. In the "Study Description" text box, provide a summary of the purpose, nature, and scope of study data. If a study description is not provided, the submission's abstract will included in cataloguing information when the study is created.

e. If the data to be published with the submission has already been deposited in a repository, provide a data citation in the "External Data Citation" text box. **A submission may include data files for deposit in Dataverse OR an external data citation.**

f. Click "Save and continue" to return to step 4, "Upload Supplementary Files," to upload additional data files.

g. When you have finished uploading data files, click "Save and continue" to proceed to "Step 5. Confirming the Submission." If you have completed the submission, click the "Finish Submission" button. A Dataverse study (in unpublished draft mode) will be created from the submission and will include any supplementary files that have been selected for deposit in Dataverse.

2. Active submissions

a. You can edit metadata of active submissions and you may upload additional data files. From "USER HOME," click the linked title of an active submission.

b. To edit submission metadata, scroll to the "Submission Metadata" section of the submission summary page and click "EDIT METADATA." Updating submission metadata will also update cataloguing information for the corresponding Dataverse study.

c. To upload additional data files, click "ADD A SUPPLEMENTARY FILE" in the "Submission" section at the top of the submission summary page. Proceed as described in "New Submissions" section 1.c above. The uploaded file will be deposited immediately in a the submission's Dataverse study. (If a study does not exist for the submission, a new study is created.)

Step 4a. Add a Supplementary File

Supplementary File Metadata

To index this supplementary material, provide the following metadata for the uploaded supplementary file.

Title *	Untitled
Creator (or owner) of file	
Keywords	
Type	Research Instrument ⬦
	Specify other
Brief description	

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Publisher	
	Use only with formally published materials.
Contributor or sponsoring agency	
Date	2015-02-24 YYYY-MM-DD
	Date when data was collected or instrument created.
Source	
	Name of study or other point of origin.
Language	
	English=en; French=fr; Spanish=es. Additional codes.

Dataverse Plugin: Publish Data

Research data can be submitted for publication by depositing supplementary files in the journal's Dataverse or by supplying a citation to data already in a repository.

◉ Treat uploaded file as supplementary file. File **will not** be deposited in Dataverse.
○ Deposit file in Dataverse. Author accepts and agrees to Dataverse terms of use.

Study Description

Provide a summary of the purpose, nature, and scope of study data.

External Data Citation

If the data to be published with this submission is already in a different repository, please provide a data citation.

Supplementary File

File Name	26-109-1-SP.csv
Original file name	ca-500.csv
File Size	86KB
Date uploaded	2015-02-24 04:34 PM

☐ Present file to reviewers (without metadata), as it will not compromise blind review.

Replace file	Choose File No file chosen	Use Save to upload file.

Save and continue Cancel

* Denotes required field

Instructions for JMs/Editors/Reviewers to review, approve, reject data sets

1. Editors can review data sets from the submission summary page. The "Submission" section at the top of the summary page lists supplementary files uploaded with a submission. Supplementary files that have been deposited in Dataverse have a Data Citation with a link to its Dataverse study. Editors can:
   i. delete a supplementary file, which removes it from OJS and the Dataverse study;
   ii. edit the file to change whether or not it should be deposited in Dataverse. The data file is added to or removed from the submission's study according to the "Deposit in Dataverse" checkbox on the supplementary file form.
   iii. upload additional data files to the submission's study. (A new study is created if one does not already exist for the submission.)
2. If an editor rejects an author's submission as unsuitable, or declines to accept it, the draft study created for the submission is deleted.
3. Draft studies are released when an editor accepts a submission for publication OR when the article is published, according to the workflow options configured for the plugin. Note: If this is the first study released in your Dataverse a notification is sent to all JMs prompting them to release their Journal Dataverse for it to be made public (see further instructions in the next two steps). You can also see this in the OJS UI on the right-hand sidebar by clicking the "View(#)" link under "Notifications".
4. To verify that the **study has been released** in your Journal's Dataverse: go to the "Submission Summary" page, find the Data Citation and click on the DOI URL where you will be prompted to put in your Dataverse username and password. Note: Please wait at least 30 minutes to click on the DOI URL, in order to give the DOI registry enough time to properly register this persistent identifier.
5. **Releasing a Dataverse (one-time)**: [with 2.4.6 you will no longer need to leave OJS to release a Dataverse, as it is done automatically via the API]
   For versions 2.4.5 and under: If this is your **first released study**, and you would like to make this Dataverse **public** the next step is to "Release" your Dataverse. You will also receive an email notification to this effect from OJS.
   a. If you are logged into your Dataverse you can release it by clicking on the red circle with an exclamation point located to the right of your Dataverse name (see screenshot below).

b. Next, under the Settings > General tab, locate "Dataverse Release Settings" and select "Released". Then, click on the "Save Changes" button at the bottom of the page. Your Dataverse is now released!

Instructions for Readers on Finding/Using Data sets

A "Data Citation" is displayed in a Citation Block:
- sidebar of published article's landing page
- next to published articles

The data citation is linked to the article's Dataverse study. Click the link to review the study and data set in the journal's Dataverse.