Janeway Imports

Release 1.5

Open Library of Humanities

Mar 24, 2023

CONTENTS

The Imports Plugin contains several toolsets for getting content into and out of Janeway. The main one for publishers using Janeway is the **Import / Export / Update** toolset.

IMPORT, EXPORT, UPDATE

The Import / Export / Update tool lets you perform some batch actions in Janeway. You can import and export article metadata and files, and you can update some fields of existing articles.
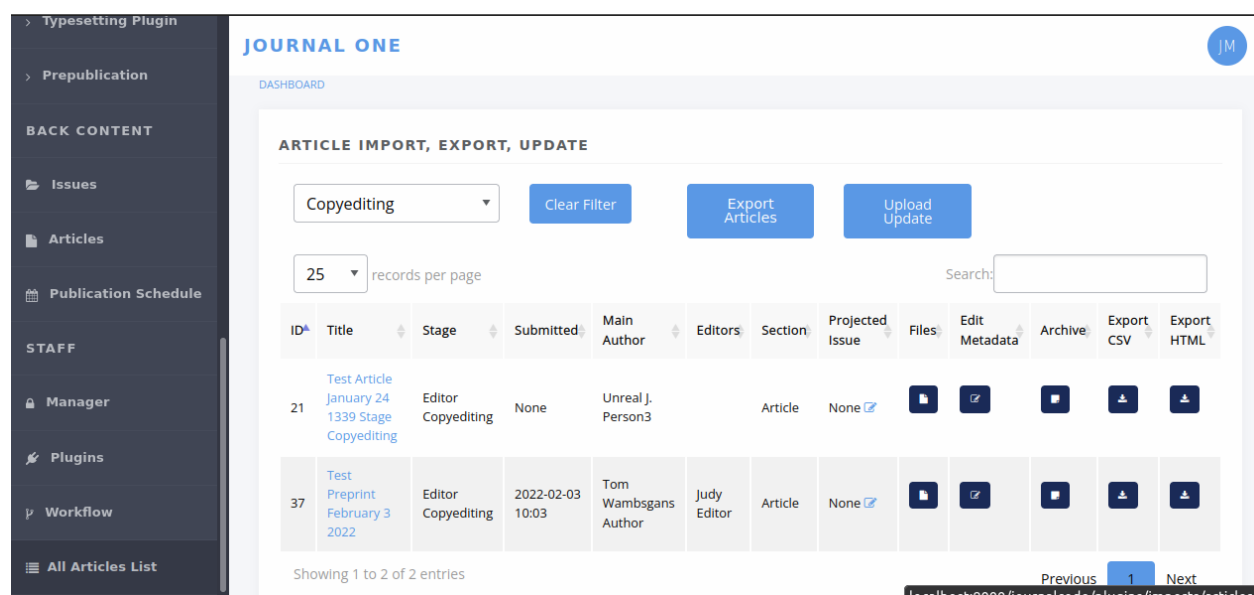

Fig. 1: The Import, Export, Update start page

1.1 Importing

With this tool, you can create new articles in Janeway and load them directly into the desired workflow stage (peer review, copyediting, typesetting, or prepublication).

1. Download a copy of the `metadata template` and open it up to edit it. You can use most spreadsheet applications, but make sure you will be able to save it as a CSV with UTF-8 character encoding.[1]

2. Enter the metadata, one article per row. See the *Metadata Field Reference* and the `sample import` for pointers. For multi-author articles, insert a new row for each author, and only fill in the author fields on extra rows.

3. Save the file with a name of your choosing.

---

[1] The Janeway ID should only be populated when updating a record that already exists in Janeway. These IDs are allocated by the system and can not be set by the user.

4. From the journal's dashboard, navigate to **All Articles** under **Staff** in the lower left. You need to have 'staff' access to view this page. (The tool also appears as **Article Import, Export, Update** in the Imports plugin start page.)

5. Select **Upload Update** and upload your file. (It says 'update', but this is how you import new things too.)

6. A table should load in your browser showing you the data, before you import it. If everything looks good, select **Import**.

Tip:

Are you importing articles that have no authors? Leave all of these fields blank:

- Author salutation
- Author given name
- Author middle name
- Author surname
- Author suffix
- Author institution
- Author department
- Author biography
- Author email
- Author ORCID
- Author is corporate (Y/N)

Other text

1.2 Exporting

You can export a CSV containing metadata for all the articles currently in a given workflow stage. It will also download selected files from that stage.

1. From the journal's dashboard, navigate to **All Articles** under **Staff** in the lower left. You need to have 'staff' access to view this page.

2. Use the **Filter by Stage** drop-down menu to choose a set of articles you want to export.

3. If you want to download associated files, use the **Files** column to add files for each article.

4. Select **Export All** or **Export Filtered**. A zip file should be downloaded containing the metadata in `article_data.csv` and the article files in subfolders numbered by article ID.

1.3 Updating

You can update metadata for batches of articles in Janeway, so you don't have to click through each individual article to make the change.

1. To update one field, you have to provide data for all the fields, or at least most of them, because the tool interprets empty fields literally, and will save empty fields (potentially overwriting older data). So we recommend you first export the set of articles, and use that as the basis for changes. See *Exporting*.

> **Warning:** The tool will let you overwrite old data if you leave fields blank, so make sure you start any update project by running an export.

2. Extract the zip file you exported and open the CSV in your spreadsheet software of choice (but be careful with character encoding).

3. Edit the metadata as desired. You an rearrange the columns but the column names have to stay exactly the same. See the `sample update`, which shows changes made to the data in `sample import`. See also the *Metadata Field Reference* for details on each field.

4. Save the CSV file with a name of your choosing.

5. On the **All Articles** page, select **Upload Update** and upload your CSV file.

6. A table should load in your browser showing you the data you uploaded, so you can look it over before importing it. If everything looks good, select **Import**.

1.4 Metadata Field Reference

The table below shows you what actions (i.e. import, export, update) you can perform with each field (yes/no). For example, you can't *import* article IDs, because Janeway assigns them for you to make sure they're unique. But you can (must) use article IDs during the update process, so Janeway can recognize the articles.

Much the same, while you can put something in Stage to send the content to the right part of Janeway on initial import, you can't subsequently *update* the workflow stage for articles already in the system, because it might break editor or author tasks in progress.

The table also shows which fields you have to provide during imports and updates, regardless of whether you are changing those fields. For example, when you're importing new articles, you have to provide article titles. You also have to provide article titles when you are updating articles, even if you're not updating the titles but something else, like the keywords.

Field	Notes	Import	Export	Update
Janeway ID	controlled and assigned by Janeway	no, will break	yes	yes, required[2]
Article title	incl. subtitle; use <em> for ital	yes, required	yes	yes, required
Article abstract	use <em> for italics	yes, optional	yes	yes, optional, saves empty values
Keywords	separate keywords with commas	yes, optional	yes	yes, optional, saves empty values
Rights	Rights statement (free text)	yes, optional	yes	yes, optional, saves empty values

continues on next page

Table 1 – continued from previous page

Field	Notes	Import	Export	Update
Licence	name of licence[3]	yes, optional	yes	yes, optional, saves empty values
Language	name of language or ISO code[4]	yes, optional	yes	yes, optional, saves empty values
Peer reviewed (Y/N)	Y or N	yes, optional	yes	yes, optional, saves empty values
Author salutation	useful in templated emails	yes, optional	yes	no, ignored
Author given name	a.k.a. first name	yes, optional	yes	yes, optional, saves empty values
Author middle name	or middle initial	yes, optional	yes	yes, optional, saves empty values
Author surname	a.k.a. last name or family name	yes, optional	yes	yes, optional, saves empty values[5]
Author suffix	e.g: 'Jr.' or 'III'	yes, optional	yes	yes, optional, saves empty values
Author email	recommended[6]	yes, optional	yes	complicated![7]
Author ORCID	starting with 'https' or the number	yes, optional	yes	yes, optional, saves empty values
Author institution	_	yes, optional	yes	yes, optional, saves empty values
Author department	_	yes, optional	yes	yes, optional, saves empty values
Author biography	_	yes, optional	yes	yes, optional, saves empty values
Author is primary (Y/N)	Y or N[8]	yes, optional	yes	yes, optional, saves empty values
Author is corporate (Y/N)	i.e. an organization	yes, optional	yes	no, will make duplicates
DOI	starting with '10'	yes, optional	yes	yes, optional, ignores empty values
DOI (URL form)	starting with 'https'	no, ignored	yes	no, ignored
Date accepted	YYYY-MM-DD (or any ISO 8601[9])	yes, optional	yes	yes, optional, saves empty values
Date published	YYYY-MM-DD (or any ISO 8601)	yes, optional	yes	yes, optional, saves empty values
Article number	integer (arbitrary / custom)	yes, optional	yes	yes, optional, saves empty values
First page	integer	yes, optional	yes	yes, optional, saves empty values
Last page	integer	yes, optional	yes	yes, optional, saves empty values
Page numbers (custom)	Custom page range such as 'x–ix'	yes, optional	yes	yes, optional, saves empty values
Competing interests	_	yes, optional	yes	yes, optional, saves empty values
Article section	e.g. 'Article', 'Review'	yes, optional	yes	yes, optional, ignores empty values
Stage	the production workflow stage[10]	yes, optional	yes	no, ignored[11]

Table 1 – continued from previous page

Field	Notes	Import	Export	Update
File import identifier	for advanced users[12]	yes, optional	yes	yes, optional
Journal code	must match Janeway	yes, required	yes	yes, required
Journal title override	Override for this article[13]	yes, optional	yes	yes, optional
ISSN override	'0000-0000' for new journals[14]	yes, optional	yes	yes, optional
Volume number	'0' if not specified	yes, optional	yes	no, ignored
Issue number	'0' if not specified	yes, optional	yes	no, ignored
Issue title	e.g. 'Winter 2022'	yes, optional	yes	yes, optional, saves empty values
Issue pub date	YYYY-MM-DD (or any ISO 8601)[15]	yes, optional	yes	yes, optional
PDF URI	A valid URI (advanced users)	yes, optional	no	yes, optional

---

[2] Using a character encoding other than UTF-8 can cause bugs during imports or updates. (What is character encoding?). These apps save CSVs with UTF-8 by default: OpenRefine, LibreOffice, Google Sheets, and Apple Numbers. However! If you use Microsoft Excel, keep in mind some versions don't automatically create CSV files with UTF-8 character encoding. This may cause punctuation and special characters to be garbled on import. So, when saving, look for the 'CSV (UTF-8)' option in the drop-down box.

[3] Support for licence URLs will be added in future.

[4] You can use conventional names like 'English' or 'Catalan' as well as three-letter language codes like 'eng' or 'cat'. Only one language per article. See ISO 639 on Wikipedia.

[5] For author fields, running an update will only update what is called the 'frozen author' record for this article–that is, the author's information at the time of article submission (or first import). This information is separate from information tied to that person's Janeway account.

[6] Email addresses are highly recommended for correspondence authors, since many parts of the workflow involve sending emails to authors, and these won't work without email addresses.

[7] You should include existing email addresses in your CSV when you're trying to update other fields. You can also add or remove author records from an article with this tool. However, you shouldn't use this tool to change an author's email address, because Janeway will think you're trying to add a new author and will create a duplicate account with the new address. We will improve this behaviour in the future.

[8] 'Author is primary' tells Janeway which author is the correspondence author. Generally, one and only one author should be marked 'Y' and the rest 'N' or blank. If you leave this field blank for all authors, the article won't have a correspondence author.

[9] See ISO 8601 on Wikipedia. Examples of accepted date or date-and-time combinations: `2022-01-04`, `2022-01-04T10:12`, `2022-01-04T10:12:38-05:00`.

[10] The workflow stage has to match one of these values exactly: `Unassigned` (for peer review), `Editor Copyediting`, `typesetting_plugin`, `pre_publication`, `Published`. If the field is left blank, the article will be put in the `Unassigned` stage

[11] Currently the workflow stage cannot be changed en masse once the articles are imported, since that might break tasks in progress. In the future we want to make it possible to change the stage of multiple articles.

[12] You can import PDF galleys with this process using the PDF URI field. The URI must use one of the following schemes: `http`, `https` or `file` (When using *file* it points a local path of the running instance of Janeway, does not support netlocs)

[13] The journal title is generally no longer required for imports as long as the title has already been entered into journal settings. Only use the journal override field if an article has a different journal title than the current journal title on Janeway, as in the case of backlist content originally published under a different title.

[14] The ISSN override field works in the same way as the journal title override, and it should only be used if you want to display a different ISSN for specific articles in special circumstances.

[15] If Issue pub date is left blank, Janeway will insert the current day's date in this field.

1.5 Custom Submission Fields

If your journal has any additional submission fields available, this plugin will also allow you to export and update such fields.

As a result, the CSV returned for such journals will have additional headers and content. If you are creating new articles via this plugin and you want to populate the custom additional field metadata, you will need to add the field name as a header on your spreadsheet.

The header location is irrelevant, as long as the header matches the name of the field in Janeway exactly.