

Checklist

Choosing a journal publishing platform

This checklist guides you through a structured evaluation of your current workflow and helps you assess various platform options, whether self-hosted or SaaS.

Use it to analyse your current setup, explore potential solutions, and choose a platform that optimises your publishing process.

1 · How my platform handles the publication workflow, from submission to publication :

- ☐ It supports the management of all processes from submission to publication. That's great because we can handle the publishing process efficiently.
- ☐ It could support the management of all processes from submission to publication but we don't use these options. Managing the entire publishing process with a journal management system would make it easier for us to handle documentation – manuscripts, reviews and correspondence – and to archive what needs to be preserved, preventing data and documentation loss.
- ☐ It can only display content, which is why we consider changing or upgrading the publication platform.
- ☐ We don't have an independent website. Journal volumes are uploaded to the publisher's website. We could use an online publishing infrastructure supporting workflows from manuscript submission, through peer review, to content display. That will enable more efficient journal management and ensure better discoverability.

2 · My publishing platform is :

- ☐ A shared platform based on free and open-source software managed by a university / national body / non-profit organisation
- ☐ Based on free and open-source software managed by our publishing team
- ☐ Based on free and open-source software managed by a commercial service provider
- ☐ Based on a widely used CMS content management systems like Wordpress, Joomla or Drupal
- ☐ Based on proprietary software and offered by a commercial service provider
- ☐ A custom-made platform developed by an IT expert
- ☐ We don't have a publishing platform
- ☐ I don't know

3 · I already have a platform, and ... : / or “What I value about my platform :”

- ☐ The platform offers all the features I need. It supports the entire scholarly publishing workflow from submission to publication. If not, consider other options.
- ☐ The software is regularly updated. If not, consider other options.
- ☐ Demos, video tutorials, and guides are available to help me familiarize myself with the platform. If not, try to get more information from the software provider.
- ☐ The software is properly documented. If not, try to get more information from the software provider.
- ☐ There are known use cases, success stories, or lessons learned from failures with this software.
- ☐ The software is backed by a large, active community of users and developers.
- ☐ Integration with key infrastructures (e.g., Crossref, DataCite, ORCID) is supported. If not, consider other options.
- ☐ The platform supports automated preservation of published content.
- ☐ The journal can be migrated to another platform without significant difficulty if needed. *If not, consider other options.*

4 · Is this independent platform right for us ?

- ☐ I have sufficient technical resources (hardware, software) to support the publishing platform.
If not, consider other options such as shared platforms or Software-as-a-Service solutions. Some countries (e.g., Croatia, Greece, The Netherlands, Portugal, Spain) offer national infrastructures based on free open-source software for OA publishers. Universities often host publishing platforms for their journals, or you can partner with other publishers to establish shared platforms. For SaaS, you can check service providers in the IPSP Registry.
- ☐ IT support for software installation is available. *If not, consider outsourcing IT support.*
- ☐ It will be possible to ensure ongoing maintenance and updates for the platform. *If not, this probably means that you don't have sufficient resources to run your own platform.*
- ☐ There are additional costs for IT support or software upgrades (included in the budget, funding sources identified). *If yes, include those costs in the budget and try to find funding sources*
- ☐ I have the financial resources allocated for ongoing maintenance, security, backups, and updates. *If yes, include those costs in the budget and try to find funding sources.*
- ☐ It will be possible to repair and replace hardware if needed. *If not, consider outsourcing hosting.*
- ☐ My hosting provider guarantees hardware and software integrity. *If not, find a different provider.*
- ☐ There is a clear agreement on the service level expectations from the hosting provider. *If yes, make sure to conclude a written agreement with the hosting provider detailing service level expectations.*
- ☐ There are enough trained personnel to manage the platform effectively. *If not, consider outsourcing support or upskilling the existing staff.*
- ☐ I have documentation detailing technical setup and workflows for transitions in case of staff changes.

5 · Is this SaaS platform right for us ?

5.1. Feature scope : Does it cover all publishing needs?

- ☐ The platform covers all the essential publishing needs, such as manuscript submission, peer review, and content distribution.
- ☐ All features required are offered by this platform.
- ☐ Those features are vital for your work. *If these vital features aren't covered by the platform, consider finding a different solution.*
- ☐ There are features offered in the service package that are not used.

These features aren't used because reasons for not using the features include:

- ☐ We don't know how to use them
- ☐ Additional staff would be required.
- ☐ We don't really need those features
- ☐ It is possible to exclude unused features from the package to reduce the cost.
- ☐ It is possible to exclude those features from the package to reduce the cost.

5.2. Long-term preservation: Does the provider ensure sustainable long-term preservation ?

- ☐ Digital preservation is included in the service package.
- ☐ The service provider collaborates with a trusted preservation service (e.g., LOCKSS, CLOCKSS, PKP Preservation Network, etc.).

If the platform doesn't meet these criteria, make sure to take care about preservation yourself. Learn more with our visual guide to digital preservation in the dedicated course.

5.3. Documentation and support: Are comprehensive guides available ?

- ☐ Comprehensive user guides, manuals, or tutorials are available to help with platform usage.
- ☐ Technical support is provided.

If the platform doesn't meet these criteria, consider changing the service provider.

- ☐ Technical support involves additional costs, and these costs are clearly indicated in the service agreement. *If not, make sure that details about technical support are included in the service agreement.*

5.4. Customization options: Is it possible to customise the SaaS platform? Under what conditions (e.g. you can do it yourself or the provider can do this for a fee) ?

- ☐ The platform can be customized to fit specific needs.
- ☐ Responsibility for customisation (e.g., self-service or provider-managed) is clearly defined.
- ☐ There is no cost involved.
- ☐ The conditions for customisation are clear. *If not, make sure that conditions for potential customisation are discussed before signing the service agreement.*

5.5. Vendor lock-in risk: Can you change the platform provider without data loss or having to pay a high fee ?

- ☐ The service provider has committed to keeping the platform up-to-date with relevant technological developments.
- ☐ It is possible to switch to another platform without data loss or a significant amount of manual work.
- ☐ There are high fees or complex processes associated with migrating your data.

If the platform doesn't meet these criteria, consider changing the service provider.