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EDIS HANDBOOK

GUIDELINES AND RESOURCES FOR STATE FACULTY

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Contents

Introduction

This handbook for Extension specialist is divided into three sections. The first two sections provide guidance for EDIS responsibilities divided between intellectual/creative work (authorship) and EDIS service. The third section is a technical guide to using and interacting with EDIS. Much of this handbook is compiled from previously developed materials, but it is intended that bringing these together into one handbook will provide a better overall picture of the scope of work required to be an effective contributor to EDIS.

Section 1: EDIS Works

This section covers the creative acts of developing, writing, and updating that result in the production of a new or revised versions of EDIS publications. We will collectively refer to these activities as "authorship." This section starts with guidelines for developing Extension publications for EDIS, describes some of the specific EDIS publication types, and provides detailed guidance for giving and taking credit for contributing to EDIS publications, and for when and how to revise EDIS publications. This section also includes a brief discussion of writing for accessibility, repackaging material, and copyright and EDIS

Section 2: EDIS Service

EDIS service includes supporting publications in an ongoing relationship as contact author, including sunset reviews for retention. It also includes peer review of EDIS publications and acting as a unit editor to conduct EDIS peer review for new and revised documents. It includes the "EDIS BMPs" developed for county faculty and volunteers and a guide for the EDIS sunset process, as well as providing strategies for managing workload for review and revision.

Section 3: EDIS System

The final section provides technical guides for using EDIS. With the use of a Florida OJ journal platform for submission and archives, EDIS now has two faces: the EDIS website presents currently supported publications in an easy-to-navigate public interface for Extension faculty, staff, stakeholders, and clientele. The EDIS journal site on the Florida OJ platform, on the other hand, provides access to current and past EDIS publications as Extension scholarship. This section will give you the tools to make efficient use of these systems and to present yourself and your scholarship most effectively to both audiences.

Part 1: EDIS Works

Developing Extension Publications for EDIS

Contributors: Martha Monroe, Diana Hagan, Saqib Mukhtar, Thomas Obreza, Michael Gutter, Martin Main, Pierce Jones (3-Mar-2018)

Introduction

EDIS (Electronic Data Information Source) is the premier electronic information storage and retrieval system of peer- reviewed Extension scholarship that enables citizens to access information provided by the Cooperative Extension Service at the University of Florida. Developed in the 1990s, the EDIS library has grown to be a large collection of electronic files with a variety of purposes. That diversity, while allowing important flexibility, also creates challenges in defining and developing EDIS products. This document offers clarification and guidelines for Extension faculty writing for EDIS.

Mission and Vision

EDIS publications share four essential qualities:

1. They support or contribute to Extension programs.
2. They communicate information pertinent to target audiences and their issues, including ways to foster healthy lifestyles, environment, or economy.
3. They provide production and management recommendations by UF/IFAS.
4. They are both sufficient to the topic and written in a way that is relevant to our partners and target audiences.

Target Audiences

In most cases, EDIS publications help answer the questions any UF/IFAS Extension clientele would have about the topic of interest. In cases where the target audience will have specialized expertise (crop irrigation managers or veterinary students, for example) EDIS is still an appropriate venue for sharing information with them. Typically, target audiences include agricultural and horticultural producers, homeowners, Extension agents, industry or governmental staff, land managers, other professionals, youth and interested citizens. This diversity of target audiences for EDIS publications makes it very important that authors describe their target audiences in the introduction and keep in mind the communication style appropriate to that audience.

The Role of EDIS in the Context of Extension Communications

EDIS has a specialized role in UF/IFAS Extension communication. It is a collection of official long-form content developed in support of Extension program area goals and objectives and co-published by Florida Cooperative Extension and one of the UF/IFAS academic departments. UF/IFAS ensures the authority and authenticity of EDIS publications through several processes:

- Authors must include current UF/IFAS academic faculty. County faculty may author publications in collaboration with UF/IFAS academic faculty.
- Fact sheets and major revisions of fact sheets have been peer reviewed by internal and external reviewers that have been selected by the corresponding author's Department or Center EDIS editors.

  - Internal reviewers should include at least one UF/IFAS specialist who can provide expert review on content.
  - External reviewers should review content and include at least one individual with expertise in the subject matter who is not employed by the home Department/Center.

- All EDIS publications and creative works have been approved by the Department Chair and Center Director of the corresponding author and the statewide leader of the relevant Extension program(s).
- Once approved, professional editing and layout provided by IFAS Communications Services ensures a uniform standard of quality in the final publication.

EDIS is one of many channels for communication available to UF/IFAS content authors. Other options that can be considered as part of an overall communications strategy are blogs and social media, news releases, infographics, video, or print products. Material that needs to be made available online but is not suitable for any of these formats can be submitted to the UF Institutional Repository or research sharing platforms, such as Zenodo (https://zenodo.org) or ResearchGate (https://www.researchgate.net).

Types of EDIS Publications

As originally developed, the EDIS system collected, organized, and served all the various types of Extension publications in the same way, using the same formatting, and managed them with a single set of policies, which includes the internal and external reviews and approvals previously described. But to better meet the varying publication needs, we categorize different types of EDIS publications as follows for more specific guidelines and policies.

Differentiating Collections in EDIS

Detailed publication criteria are included in the Appendix.

1. Extension Education Publications

   1. Peer-reviewed Fact Sheets.
   2. Organism ID and biology: illustrated descriptive information of one or more organism or species.
   3. Management guides: Usually collections of book chapters or an EDIS series, may primarily consist of IFAS recommendations and/or conveniently arranged tabular data. Reviewed and/or revised annually. Authorship tends to change frequently.

2. Extension Creative Works

4. Program materials: Formatted brochures, handouts, forms, posters, or other materials (but not evaluation materials) that are used in support of Extension programs.
5. Curricula and training handbooks: Curriculum and training materials belong in EDIS if they are project books for 4-H leaders and youth, lesson plans for educators, or professional development training. Individual lesson plans should not be published as separate documents; rather, they should be compiled into one document that includes background information such as the intended audience, how it was produced, and how it should be used.

Fact Sheet Guidelines

The typical EDIS publication is a fact sheet, with other types of publications sharing many of these features.

A good EDIS fact sheet should include:

- An introduction that frames the problem, identifies the target audience, provides the rationale for the document, and defines how it should be used. A short abstract may be useful.
- Language that is both technically accurate and at the same time free of jargon, academic terminology and burdensome vocabulary. It should be accessible and interesting to people without a college degree (unless written for a specialized audience as part of a broader Extension program).
- A summary that reminds the reader of the key points and directs them to supplemental information.
- Numbered and captioned photographs and illustrations that add to the visual appeal of the publication and illustrate key points.
- Citations and a literature cited section, such as used in peer-reviewed publications, is not required but may be valuable for documents intended for technical subject matter and professional audiences that expect references to be cited.

Format

The standard format for EDIS education publications is 8-1/2 x 11-inch printed pages, laid out using a standard EDIS template. Alternate formats are common for Extension creative works. Templates have been developed for items such as large print handouts, one page ID sheets, forms, curricula, and trifold brochures. Regardless of the delivery format, the content of an EDIS publication must conform to the standards outlined above.

Summary

The publishing process and management policies described in this publication are intended to help UF/IFAS ensure the ongoing authority and relevance of Extension publications.

Ultimately, the quality and relevance of our EDIS collection depends on the contributions from our authors and reviewers. Extension faculty writing for EDIS should begin with a clear

understanding of their target audience, the role the planned publication is expected to play in their Extension program, and the publication type and format best suited to those goals.

Reviewers and approvers of EDIS publications also play a vital role by ensuring UF/IFAS EDIS publications are of the highest quality. Through this process, we will continue to demonstrate that EDIS is the primary system for peer-reviewed Extension scholarship.

[For Appendix of publication criteria please see published PDF at:
https://edis.ifas.ufl.edu/faq/docs/DevelopingEDIS.pdf]

Specific Guidance for Publication Types

Management Publications

Tables for Ornamental and Selected Horticulture Plants in Florida

The UF/IFAS Extension Administration established guidelines for preparing pesticide tables to be incorporated into EDIS publications on ornamental and landscape horticulture. These guidelines were requested by Extension agents working in the areas of commercial and residential landscape, nurseries, commercial fruit and vegetable production, small farm production, turfgrass operations, livestock, and urban pest management. Providing information about the safe and effective use of pesticides is a critical requirement for many UF/IFAS Extension professionals. Certain state specialists and Extension agents are the primary sources of information on the availability and use of pesticides, and this information must be readily accessible to Extension personnel who provide recommendations to clientele.

This guide was developed with the following objectives:

1. Continuously obtain current pesticide efficacy data for ornamental and selected horticulture plants in Florida from UF/IFAS state and county faculty.
2. Incorporate standardized pesticide tables in EDIS publications that provide current pesticide efficacy data for ornamental and selected horticulture plants in Florida.
3. Conduct and maintain an up-to-date inventory of pesticide recommendations and efficacy data for ornamental and selected horticulture plants available from other land grant institutions that is applicable to Florida.

The guide provides best management practices for specialists and agents to follow in developing and revising standard pesticide tables in EDIS publications. The pesticide tables will contain accurate and easily accessible information to assist in making pest management recommendations

Pesticide Experts

An expert(s) shall be identified and given responsibility for updating each pesticide table. The expert(s) shall be designated as the contact in the table caption and acknowledged for their expertise. This will enable accurate citation of an author's contributions to the publication, for example:

Constance C. Contributor, Table 1 in *IFAS Management Publication*. IPN, by Albert A. Author and B. Coauthor. Gainesville: University of Florida Institute of Food and Agricultural Sciences, Year of publication. http://edis.ifas.ufl.edu/DLN.

Publication Management

Submissions of new pest management publications with pesticide tables shall be accompanied by a plan for ongoing maintenance of the publication and address the following:

- Annual revision schedule
- Revision procedures, including sources of the information

- Peer review process, if appropriate
- Publication, including plan for print production of guides or handbooks, when appropriate

Faculty Editor

The pesticide tables in EDIS publications and handbooks must have designated faculty editors who are responsible for coordinating the publication process. Faculty editors responsible for coordinating the overall process may or may not have an author or contributor role. A single publication may also have an editor instead of authors, if it is comprised primarily of tabular data contributed by multiple individuals.

Data Management

Publications that include tables of pesticide data shall consider ease of management and update of the data through time. Data must also meet UF Web accessibility standards.

Standardized Table Formats

These standard table templates were developed for use in delivering pesticide efficacy data coded for accessibility. The tables have been reviewed and approved by UF/IFAS Extension's regional "Green Teams" for use by the ornamental and landscape horticultural pest management faculty.
The following statement about the use of pesticides in IPM shall appear at the top of each table:

> This table lists registered pesticides that should be integrated with other pest management methods. Contact your local UF/IFAS county Extension office for additional information (https://ifas.ufl.edu/, UF/IFAS Locations at the bottom of the webpage).

Sample pesticide table templates for ornamental and selected horticulture crops in Florida

Table 1. Weeds (pre-emergent). Contact: Weed Specialist (email@ufl.edu).

Herbicide active ingredients (Commonly used products)	HRAC MOA	Application(rate and total/year)	Reentry (days)	Weeds controlled, application methods and effectiveness (if known or blank), (see product label for details) (indicate restricted use in bold)
Carfentrazone(Aim 1.9 EW or AIM 2.0 EC)	14			Apply for broadleaves up to 4 inches tall or rosettes less than 3 inches across, good coverage is essential, no pre-transplant interval

Table 2. Weeds (post-emergent). Contact: Weed Specialist (email@ufl.edu).

Herbicide active ingredients (Commonly used products)	HRACMOA	Application(ratee and total/year)	Reentry (days)	Weeds controlled, application methods and effectiveness (if known or blank), (see product label for details) (indicate restricted use in bold)
Carfentrazone(Aim 1.9 EW or AIM 2.0 EC)	14			Apply for broadleaves up to 4 inches tall or rosettes less than 3 inches across, good coverage is essential, no pre-transplant interval

Table 3. Insects and relatives. Contact: Insect Specialist (email@ufl.edu).

Pest	Pesticide active ingredients (Commonly used products)	IRACMOA	Application(rate and total/year)	Reentry (days)	Application methods and effectiveness (if known or blank), other pests controlled (see product label for details) (indicate restricted use in bold)
Aphids	methomyl (Lannate)	1A	LV 1.5-3.0 pt/acre, max. 21 pt LV/acre/ crop	2	

Table 4. Plant diseases. Contact: Plant Pathology Specialist (email@ufl.edu).

Disease	Pesticide active ingredients (Commonly used products)	FRACMOA	Application(range and total/year)	Reentry (days)	Application methods and effectiveness (if known or blank), other diseases controlled (see product label for details) (indicate restricted use in bold)
Gray mold	fenhexamid (Elevate)	17	1.5 lb./A, max. 4 appl.		Apply at 7 to 14-day intervals if disease conditions develop, apply at fem stage only, 180 days to harvest

Program Materials

Program materials are formatted informational brochures, handouts, forms, posters, or other materials (but not evaluation or marketing materials) that are used in support of Extension programs. Authors should review UF/IFAS branding guidelines and ask for assistance with design work through IFAS Communications.

Source List

UF/IFAS numbered program materials in EDIS must be based on source material that is on EDIS or selected by current academic faculty.

- EDIS will maintain a list of approved source materials, organized by program area, from which program materials have been derived.

- Each source must be supported by current UF/IFAS academic faculty who are qualified to evaluate the currency of the material (The scope of the source must not exceed the scope of the supporting faculty's area of expertise).

- Source materials will be reviewed at a periodic interval (determined by the source material type) by the supporting specialist to determine if revisions are needed to the program materials based on them.

Adding a Source to the Source list

A current EDIS publication is added to the source list only with the permission of the source's contact author, on publication of program materials using it as a source.

Non-EDIS publications may be included in the source list, provided that a qualified current UF/IFAS academic faculty supports its use as a source and we have rights to create derivative works.

Examples:

2012 USDA Plant Hardiness Zone Map http://planthardiness.ars.usda.gov/PHZMWeb/

Publication Type Program Materials (Applies to Creative Works that are available on EDIS)	
Target Audience	Participants in UF/IFAS Extension programs
Purpose	Support of Extension programs
Content	Formatted informational brochures, handouts, forms, posters, or other materials (but not evaluation or marketing materials) that are used in support of UF/IFAS Extension programs.
Visual style	UF/IFAS Branding guidelines must be followed. EDIS brochure and handout templates comply with these guidelines. Design subject to ICS Creative Director approval.

Numbering	Official UF/IFAS Publication Number must be used.
Authorship	At least one current UF/IFAS state or county faculty member must be associated with the work as an author.
Review/editing	The source of the technical content must be identified on the program materials, and should be either (1) current EDIS peer-reviewed publications or (2) an approved reference for which the creators have obtained permission to create derivative works. On publication, reviews should be secured by: The supporting contact for the source material and At least one internal reviewer with relevant expertise to evaluate readability and clarity of content. Must be edited by an ICS EDIS Editor.
Approval	Must receive administrative approval of Unit Leader (DED, Center Director or Department Chair), and UF/IFAS Extension Program Leader(s) before publication.
Lifecycle	Review by corresponding or designated author of the source material when the *source material* comes up for review to determine if it or any of the related program materials should be retained, revised, or archived.
Archive	UF Digital Library's Florida Historical Agriculture and Rural Life Digital Collection http://ufdc.ufl.edu/flag

Translations

Translations are derivative works of peer-reviewed publications on EDIS that are rendered into another language for use in support of UF/IFAS Extension programs. A translation is a rendering of a work in a different language with no substantial change in the informational content of the original.

Translations must be based on current EDIS publications. EDIS will maintain a list of publications which have translations associated with them.

- The translated publication must be supported by current UF/IFAS academic faculty

- The source material will be reviewed at a periodic interval (determined by the source material type) by the supporting contact to determine if revisions are needed to the translation.

Publication Type Translation (Applies to Creative Works that are available on EDIS)	
Target Audience	Non-English-speaking participants in UF/IFAS Extension programs
Purpose	Support of Extension programs
Content	Translated content from the source material into the target language
Visual style	Identical to source material style.
Numbering	Official UF/IFAS Publication Number must be used. Typical practice is identical numbering to English with a language suffix (e.g. "-SPAN")
Authorship	Retain author list from source material. UF/IFAS affiliated translators may be added as co-author.
Review/editing	The **source** of the translation must be identified on the translation, and should be a current EDIS peer-reviewed publication or program material The supporting contact for the source material and At least one language reviewer with relevant expertise to evaluate readability and clarity of content.
Approval	Must receive administrative approval of Unit Leader (DED, Center Director or Department Chair), and UF/IFAS Extension Program Leader(s) before publication.
Lifecycle	Review by corresponding or designated author of the source material when the *source material* comes up for review.
Archive	UF Digital Library's Florida Historical Agriculture and Rural Life Digital Collection http://ufdc.ufl.edu/flag

Curricula

Curriculum and training materials used in UF/IFAS programs belong in EDIS if they are project books for 4-H leaders and youth, lesson plans for educators, or professional development training.

Individual lesson plans should not be published as separate documents; rather, they should be compiled into one document that includes background information such as the intended audience, how it was produced, and how it should be used.

Curriculum and training materials on EDIS will be considered peer-reviewed if they follow guidelines that ensure that (1) the content is research-based and developed/supported by UF/IFAS Extension and (2) the delivery of curriculum is based in current UF/IFAS knowledge and research.

4-H curricula should follow the process described in Vision and Guiding Principles for 4-H Youth Development Curriculum. Curricula and training materials that are outside of the scope of 4-H Action Teams but relevant to UF/IFAS Extension program areas should submit a development plan for approval by the 4-H Curriculum and Evaluation SSA.

Publication Type	Curricula and Training Handbooks
Target Audience	4-H leaders and youth, educators, trainers
Purpose	Structured instruction/education setting
Content	Project books for 4-H leaders and youth, lesson plans for educators, or professional development training. Individual lesson plans should be compiled into one document that includes background information such as the intended audience, how it was produced, and how it should be used.
Visual style	UF/IFAS Branding guidelines must be used. Design subject to ICS Creative Director approval.
Numbering	Official IFAS Publication Number must be used.
Authorship	At least one current UF/IFAS faculty member must be associated with the work as author or contact.
Review/editing	Developed and peer-reviewed according to approved curriculum development guidelines, (e.g., Vision and Guiding Principles for 4-H Youth Development Curriculum). Must be edited.
Approval	Must receive administrative approval of the 4-H Curriculum and Evaluation SSA, Unit Leader (DED, Center Director or Department Chair), and UF/IFAS Extension Program Leader(s) before publication.

	Youth-related curricula must receive administrative approval of 4-H program leader.
Lifecycle	Review by corresponding or designated author or 4-H Action Team every 3 years to determine if it should be retained, revised, or archived.
Archive	UF Digital Library's Florida Historical Agriculture and Rural Life Digital Collection http://ufdc.ufl.edu/flag

Attribution Guidelines for Contributors to Extension Publications

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Introduction

This document provides guidance to Extension faculty authors of EDIS publications for how to give appropriate credit or attribution depending on what a person contributed and how those contributions should be reported for T&P. In the aim of clarifying roles and responsibilities, a new distinction is established between the creative intellectual act of authoring a publication and the academic service that Extension faculty provide in support of publications as contact authors responsible for ongoing review and revision.

Criteria are provided for revision authors and distinguishing between major and minor revisions. Three appendices are included: Appendix A provides a decision tree for determining revision and authorship issues; Appendix B provides guidance for support staff working with EDIS publications; and Appendix C provides guidance for citing and reporting EDIS work.

Background

Prior to the 1990's when UF/IFAS started digitizing Extension publications, there were a diverse array of published outputs: circulars and bulletins, departmental fact sheets, and various special handbooks and series. IFAS CD-ROM products and EDIS handled everything as a document file, rendering such distinctions moribund, and policies were developed which applied across the board to all publications, regardless of differences in content, purpose, and use. Since then IFAS has operated with a policy framework and publications management software hampered by this generic approach to publications.

Plan of Work Projects and EDIS (IFAS Communication Services, n.d.) specified three required characteristics of EDIS documents:

1. "A current faculty member must have reviewed the documents within the past three years and have the date of last review shown as part of the document.
2. All documents must have a current faculty member identified as responsible for the content of the document.
3. All documents prepared in EDIS format are Web-ready."

By requiring a named author on the document who is also a current faculty member, and that every three years that author must engage with the content to review it, IFAS asserted a contributor role with respect to publications which extends the initial act of authorship and requires an ongoing relationship in support of the publication. Lacking a distinct definition of this support role, persons taking on support for a publication were by practice added as a new author, even when there are few to no necessary changes to be made in the content. Over time, and especially as original authors retired, passed away, or left IFAS, issues have emerged

regarding how to handle authorship. In 2008, then associate dean Millie Ferrer-Chancey issued a memo outlining a process for handling revisions when the author is no longer with IFAS:

> "When a new faculty member assumes responsibility (makes revisions) for a publication for a faculty member who has left, the new faculty member's name should be on the publication with the former faculty member. At the first revision the new faculty member should be the jr. author and after the second (and subsequent) revisions they become the sr. author. A statement in footnote should state, "original written by: __, former faculty member; revised by: __." —*[electronic memorandum, 1/15/2008]*

This "rule of thumb" has made decision-making simple for some types of frequently updated publications, but has proved unworkable or caused problems in other situations. It is apparent that more nuanced guidelines are needed.

Guidelines for Attribution

An EDIS **document** can be thought of as a container for intellectual **work**, or a set of ideas put into the document using text, with the intention of being communicated to its intended audience. (Smiraglia, 2001 p.4). A work may be used in many documents. For example, EDIS program materials and translations are based on the peer-reviewed work published in other EDIS documents.

For contributions to the work in the EDIS document, it is important to make a distinction between authors and contributors. Both deserve credit for their contributions to the work, but authors have general responsibility for the entirety of the content in the work and can be consulted about changes in authorship, archiving, and other ongoing decisions about the publication. Contributors have a more limited or specialized role and do not have an ongoing role with the work as a whole. For guidance on reporting specific contributions, see Appendix C.

Authors are named in the author byline (called the "browse list" on the OJS submission form). Persons named as authors will have contributed intellectually to the creation of a work as a whole. Listed authors have an enduring degree of ownership of, authority over, and responsibility for the entire work.

If a new author revises an existing work for which they were not an original author, they will be designated as the **revision author**. They will have contributed intellectually to the revision of the work as a whole. They will also be entitled to an enduring degree of ownership of, authority over, and responsibility for the entire work as it was revised. Criteria for revision authorship are explained in the revisions section of this document.

An individual should be listed as a **contributor** in a contributor list or in the metadata if they contributed to and are responsible for only a portion of a publication, such as figures, tables, or sections, but are not responsible for the entire work. Contributors do not have an enduring role with respect to future revisions of the work.

Note that these roles only refer to the intellectual work of creating or revising an EDIS document.

Academic Service for Supporting EDIS Publications

A **contact** is an individual who takes responsibility for a work and has ongoing authority over it. This person is often also the primary author of the publication. However, a person may assume the responsibility as contact for the publication who has not contributed intellectually to the content. Some examples of situations requiring non-author contacts are as follows:

- an individual contributor or editor responsible for producing a management publication,
- an academic advisor for a student author's work,
- a specialist taking over responsibility for a work written by someone who is no longer involved with the UF/IFAS Extension program,
- a specialist supporting republication in EDIS of external content (With permission as necessary. For example, MyPlate Handouts for nutrition programs)

Other Roles

The following roles may or may not be listed as authors, depending on the situation, but should be included in the metadata of the submission record.

A **publication coordinator** is a staff person who facilitates the production and maintenance of Extension publications for a unit. A publications coordinator should only be listed as a contributor when they have subject expertise and have contributed intellectually to the work.

A **translator** is an individual who translates an original work into another language. A UF/IFAS contributor who creates a translation may be included in the author by-line of the translation if the translation is in their area of expertise and they may retain an enduring role with respect to the translation. A hired or staff translator may be indicated in the metadata only and should not have any expectation of an enduring role with the translation. This should be made clear between the authors of the original content and the translator before publication.

An author of a work who is not involved with a revision of that work will be designated as a **former author** in the submission metadata. They may be retained in the author by-line or only listed in the metadata. Permission for the revision and change in authorship should be obtained from former authors where possible, and they will not be understood have any further role with respect to the revised publication.

Similar to translators, a **designer** is a person who designs a creative work expressing content in their area of expertise. They may be listed in the by-line and/or metadata as a designer and may retain an enduring role with respect to the work. A staff person or contracted designer should be identified in the metadata but usually does not have an enduring role with the publication. This should be made clear between the authors of the original content and the designer before publication. All works that do not use standard designs are subject to approval by IFAS Communications.

Acknowledging Contributions

Authors may use an acknowledgement section to publicly identify and express gratitude to persons who do not meet the criteria for the any of the above roles.

Guidelines for Revisions

Criteria for revision authorship

It is sometimes desirable to update an existing publication with new information, and appropriate for a new author to do this work. The list below describes a number of categories of revisions that might be necessary to keep publications relevant as new information becomes available or as program needs change. These categories correspond to criteria that have been identified in information science (RDA Toolkit, Appendix J) as types of work that can be ascribed to an individual author.

- **Update**: You added current information not available to the original authors.
- **Adaptation**: You made changes to reflect a new approach to the topic.
- **Modification:** You made changes to meet the needs of a different audience.
- **Redesign**: You changed the basic design (e.g., organization) of the prior work.
- **Integration**: You adjust the writing style to be consistent with the style of related works (as with a series or handbook).

In addition to fitting one or more of these categories, as a revision author, your contribution to the work should

- be consistent with your area of expertise, and
- serve to meet the needs of an Extension program area.

20% Rule

Further guidance can be had from the Chicago Manual of Style, which describes a new edition as justified when substantial change has been made to one or more of the essential parts of the work. It suggests a threshold of twenty percent of the content being changed to justify a new revision. (CMOS 17, §1.26)

When no revisions should be made

Some types of publication may not be amenable to revision. Current faculty supporting this type of content may choose to contribute a forward to establish context for a changing audience; they should not assert authorship of the original content. Criteria used by scholars to make a case for attributing authorship to a specific individual in a historical corpus (Foucault, 1984) can be used to establish some rules for when an Extension publication should be considered solely the intellectual work of the original author(s):

- Is the work characterized by anecdotes, personal stories, and the general "voice" of the original author?
- Does the work cover a particular event or scope of time in the past?
- Does the work concern the intellectual output of the original author?

Major or Minor Revision?

Authorship of major revisions and new publications are counted as faculty accomplishments. Therefore, a major revision should reflect a significant effort on the part of the authors. Major revisions also require peer review, so the revision should add a certain academic contribution to the content. In the event of question as to whether a revision counts as major or minor, the determination should be agreed upon by the unit and program approvers.

There are three conditions justifying a major revision:

1. **significant** content change (20% rule)
2. **academic** content needs peer review
3. **impactful** changes, as to recommendations

If only one of these conditions have been met, it may be more appropriate to handle as a minor revision. It occasionally happens that minor but impactful changes to the text render previous versions of a publication obsolete. Or the content may be changed significantly, but there may be nothing that rises to needing peer review. In these cases, a revision note at the beginning of the publication or in the title footnote could be added to indicate what has been changed.

Authorship changes in minor revisions

All revisions with author changes require submission through OJS to the department's section in order to ensure all parties have been notified and to create a distinct version of the publication for citation purpose. If the changes are trivial, supporting faculty contacts should consider a "reviewed" status instead of making revisions.

o In the Source field on the submission form, include the DLN and the date of the version that was revised.
o The submitted manuscript must show "Track changes" so the revisions to the original work are clear
o In the "Comments for the editor", include information about the revision such as: major or minor, reason for taking on the revision
o Provide the email or contact information for any original authors who might need to be advised or consulted about revision. Former authors should have the "Former Author" role in OJS
o The revising author(s) should have the "Revision Author" role in OJS

Copyright

Authors are responsible for securing written permissions for legal use of copyrighted material, graphic images, and photographs used in UF/IFAS resources for print and the Internet. These should be uploaded along with the submission files for recordkeeping purposes.

UF/IFAS Extension holds copyright for all works published on EDIS unless otherwise noted. In the event of a reasonable request to reproduce or re-use EDIS publications, please refer the request to IFAS Communications. Educational use is generally granted if the person or organization requesting use publishes a statement crediting UF/IFAS Extension, with the name of the publication and the publication date.

Conclusion

Considering the amount of effort that goes in to creating, reviewing, and maintaining our extensive collection of Extension publications, it is important that we appropriately and equitably credit each individual. These guidelines provide the tools for authors and contributors to communicate about their specific roles and responsibility and reduce confusion in the publishing process.

References

Foucault, Michel (1984). "What is an Author" in *The Foucault Reader*. Vintage Books, New York. (p.101-120)

RDA Toolkit. "Appendix J: Relationship Designators: Relationships between Works, Expressions, Manifestations, and Items." http://access.rdatoolkit.org/. Accessed December 18, 2019.

Smiraglia, Richard P. 1981. *The Nature of "A Work": Implications for the Organization of Knowledge*. The Scarecrow Press, Lanham, Maryland.

University of Chicago Press. The Chicago Manual of Style, 17th edition.

Appendix A. Authorship & Revision decision chart

1. What type of work is it?

   - Completely new work...................Intellectual Work, go to #2
   - Revision of existing work

     > STOP if the original work
     > - is characterized by personal anecdotes or stories that reflect voice of the original author(s)
     > - covers a specific event or point of time in the past, or
     > - describes academic work done by the original author(s)
     >
     > These types of works should not be revised
     > ....Academic Service, go to #3

     - Does the revision accomplish one or more of the following?
       - **update** – to add current information
       - **adapt** – to reflect a new approach to the topic
       - **modify** – to meet the needs of a new audience
       - **redesign** — to change the structure or outline of the work
       - **integrate** – to adjust the writing style to be consistent with related works
     - YES....................................Intellectual Work, go to #2
       - Submit to OJS as new submission.
       - Identify the original version in the metadata as the source.
       - The revision will have a new DOI (Digital Object Identifier)
     - NO ....Academic Service, go to #3
       - If revision is necessary (broken links, updated contacts, etc.) add a revised galley to the original submission in OJS
       - The revision will use the same DOI as the original version.

2. Intellectual Work: Did the person contribute intellectually to the work?

   - The whole work? ....AUTHOR
     If lead author ...."Principle contact for editorial correspondence"
   - Only part of the work?
     - Figures.........................figure credit
     - Tabular Data ....table credit
     - Specific section(s).......section credit
     Was contribution significant?
       - YES ....CONTRIBUTOR
       - NO ....Acknowledgements, if applicable
   - Revisions throughout?............REVISION AUTHOR
   - Former author with no involvement
     in current revision? ....FORMER AUTHOR

3. Academic Service: Will the person be responsible for the work going forward?

- YES..CONTACT
- YES, as Source author.............citation in publication + CONTACT
- NO ....no role (Acknowledgements, if applicable)

Appendix B. Guidelines for support staff working with EDIS manuscripts

When support staff work on EDIS manuscripts as part of their job duties, the lead author should make clear whether they will be listed as an author or contributor. UF/IFAS support staff should be listed only if they have subject area expertise and contributed intellectually to the submitted work. See guidelines for author attribution if this is the case.

Support staff are not responsible for making decisions during the publication process or for providing ongoing support after publication. For this reason the editorial contact for the publication should be the lead author, not a staff person.

However, persons who have contribute to the development of an EDIS publication should be included in the metadata of the submission record, even if they are not named on the publication, and it may be helpful for them to have a role in the submission process. EDIS has defined the following roles in the system that may be appropriate for support-staff contributors:

- **Publication Coordinator:** A person who facilitates the development and publication of the submission
- **Translator:** An individual who translates an original EDIS publication into another language.
- **Designer:** A person who creates the design or layout of a creative work. All works that do not use standard designs are subject to approval by IFAS Communications.

Working with OJS
> *Email notifications only*

Authors may identify staff in the list of contributors in the submission metadata by providing name, email address, and role. Persons listed will be copied on the notification when the submission is submitted, when it is approved, and when it is published.

> *Co-authors and support staff as submission participants*

In order to work with an EDIS submission on the EDIS Florida OJ site (https://journals.flvc.org/edis) support staff must first have an account with one of the defined author roles. New users can register themselves at https://journals.flvc.org/edis/user/register or contact the journal manager (Diana Hagan, dihagan@ufl.edu) for assistance. Staff with an author role may submit manuscripts.

Participants may upload and download files and are able to participate in discussions with the other participants designated for each phase of the process. Editors may add or remove participants as necessary.

Appendix C. Reporting EDIS Workfor Tenure and Promotion

14. Creative Works

- EDIS Program Materials & Translations

16. Publications

g. Non-Refereed Publication

- Author, co-author, revision author

19. University Governance and Service

B. Service to College

- # of EDIS publications you are responsible for as faculty contact for sunset
- # of annually revised management publications to which you contribute data

21. Editorial

A. Editor: Includes Department Editor, Center Editor, Management Guide Editor
   EDIS (ISSN: 2576-0009), https://journals.flvc.org/edis/index
B. Reviewer
   EDIS (ISSN: 2576-0009), https://journals.flvc.org/edis/index # of reviews (statistics available from OJS)

Part 2: EDIS Service:
Maintaining Publications in Support of Extension Programs

Repackaging as a Strategy to Increase Efficiency in Extension Programs

Laura A. Warner (reproduced from AEC492/WC155, rev 11/2016)

Introduction

Extension has drastically changed over the past few decades, with the number of agents and amount of resources reduced nationwide. The new reality means individual Extension agents' responsibilities have increased, leaving them to do more with less (Clary, White, & Mullins, 2000). As Clary et al. describe it, "being in touch with a larger number of people in more divergent locations is the reality of Extension agents' duties" (2000, para. 5). Despite new challenges, Extension professionals still work to ensure that their creative and educational materials reach as many outlets and clients as they possibly can. A strategy for facing this challenge is to *repackage* materials in different formats for different audiences. (Repackaging is a way to reuse the research and writing one has done on a particular topic by formatting it in multiple formats for several audiences.) The purpose of this article is to encourage repackaging as a strategy to increase efficiency in Extension programming and to make recommendations for specific applications of this methodology.

Repackaging Extension Outputs

Extension professionals must frequently choose what activities they pursue and what needs they address. The use of multiple creative outputs allows agents to reach more people in different audiences and achieve a greater return on time invested. Extension professionals spend a substantial amount of time researching specific topics in their fields and translating research-based information into a number of creative outlets. This research may be translated for clients through consulting emails, telephone calls, site visits, lectures, PowerPoint presentations, websites, newsletter articles, and many other outlets. The following is a list of some of the many outlets that may be considered.

- Blog post
- County fact sheet
- Email written report (to client)
- Electronic data information source (EDIS) document
- Newsletter article (print-based)
- Written report (to employer: county / Extension system)
- Written scenario for training presentation
- Journal article
- E-newsletter article
- Press release
- Social media post (Facebook, Twitter)
- Online photo database
- Online video
- Public service announcement

- Section in a diagnostic manual / toolkit

Repackaging is a great strategy for any agent with a heavy workload and multiple or segmented audiences. The following scenario illustrates this strategy applied to the workload of an Extension professional working in horticulture.

Example: An environmental horticulture agent conducts a site visit to assist a professional client in diagnosing a landscape disorder. The agent identifies the problem as a specific pest infestation and spends a few hours researching the available courses of treatment for the client. The agent spends additional time writing an email report presenting possible solutions to the problem and providing additional recommendations for keeping the landscape healthy and reducing the chance of pest problems in the future. While the recipient of the report will greatly appreciate the diagnosis and follow-up report, the time spent researching and writing could be leveraged into numerous other outlets that serve many additional clients.

With a little more effort, this diagnosis and report could be repackaged in many ways. For example, the agent could rewrite the report for a general audience and post it on on the county website. Photos of the problem with a brief identification and solution could be used as part of a disorder-identification tool, either online or in print, or both. The report could be reworked into newsletter and newspaper articles for professional and homeowner audiences. It could also be reworked into a county fact sheet for clients with the same pest problem. The situation (photos of symptoms and signs) could be presented as part of an identification activity during a workshop for professionals or master gardeners.

While printed educational materials are still highly relevant in education, Extension is no longer dependent on print-only forms of communication and now relies more heavily on electronic communication (Franzen-Castle, Henneman, & Ostdiek, 2013). Technology-based channels should be considered as a means for increased efficiency as well as ways to reach new audiences (Diem et al., 2011). The use of both electronic and print communications, and even multiple digital channels for reaching clients, can expand an agent's reach exponentially. Figure 1 illustrates the potential outlets and reach of a single email, repackaged. This email to a single client is rewritten to serve the needs of many audiences. The topic could include any subject an agent teaches, ranging from advice on how to manage a residential lawn during times of drought stress, to identifying a specific pest problem, to making recommendations about the best course of establishing credibility as a green industry professional.
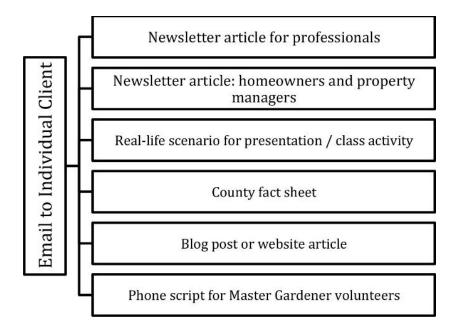
Figure 1. A representation of the potential reach of the research invested in one email when repackaged for various audiences.

Best Management Practices for Repackaging Extension Materials

The following is a summary of recommended best management practices for using this strategy.

- When creating any educational output, Extension professionals should consider the following:

  - Would this material be useful to additional Extension clients?
  - Where are those clients and how can they be reached?

- Schedule regular times to review existing pieces and then rewrite and repackage the materials. Explore both public materials (such as class handouts) and private materials (such as email correspondence.)
- Consider writing a comprehensive primary piece once, and then adapting it into other formats. (Example: an extensive report may be broken into smaller pieces.)
- Adapt materials to meet the needs of the intended user. Content should reflect what the specific audience wants to know using terminology that they understand and the language they speak.
- Consider adapting materials in both printed and electronic formats.
- When adapting a written piece to a digital one, ensure that the piece is concise and visually appealing.
- Consider reusing photos and samples submitted by clients. (Example: when a client submits a physical sample for species identification, take a photo of the sample and use it to educate other audiences.)

- When creating electronic materials, such as blog posts or web pages, create a printer-friendly (PDF) version that can be easily accessed and shared with clients.
- Develop an organizational system that allows clients to find materials easily, with minimal or no assistance. This could be in the form of an online list linking to fact sheets or an in-office directory of county fact sheets.
- Build an evaluation component into repackaged activities. At a minimum, this would include the numbers of clients using materials, which could consist of website views, paper copies distributed, or materials requested from an Extension office. The evaluation component would be strengthened if a mechanism for contacting and surveying users was created to determine outcomes of using the materials. (Example: a mailed follow-up survey to a sample of clients who have requested written materials).
- Consider forming a network with other professionals who have similar responsibilities and then partner in sharing and repackaging materials. (Example: a tri-county horticulture agent partnership.)

Conclusion

This article presented a basic overview of repackaging materials in order to reach more people in multiple audiences. Extension professionals should consider how their work could be reinterpreted and reused to meet needs in the diverse communities they serve. This strategy allows Extension to ultimately do more with less and reach more of its audience through various channels. In the words of Franzen-Castle et al. (2013, para. 7), "our audiences are already everywhere, so we need to be there too."

References

Clary, J., White, B., & Mullins, G. (2000). The influence of cellular telephone usage on the perceived role and functions of county agents. Journal of Extension, 38(3) Article 3RIB1. http://www.joe.org/joe/2000june/rb1.php (November 2016)

Diem, K., Hino, J, Martin, D., & Meisenbach, T. (2011). Is Extension ready to adopt technology for delivering programs and reaching new audiences? Journal of Extension, 49(6) Article 6FEA1. http://www.joe.org/joe/2011december/a1.php (November 2016)

Franzen-Castle, L., Henneman, A., & Ostdiek, D. (2013). "Reduce" your work load, "re-use" existing extension print materials, and "recycle" to new digital platforms. Journal of Extension, 51(4) Article 4TOT2. http://www.joe.org/joe/2013august/pdf/JOE_v51_4tt2.pdf (November 2016)

Copyright and EDIS

It has been determined by UF General Counsel that EDIS documents are considered intellectual property owned by the university. (See the UF Intellectual Property Policy for more information) Therefore, the university has the final say in granting permission for reuse, but information from the authors is typically sought before making a determination.

Granting Permission to Use EDIS Publications

Reasonable requests to reproduce or re-use EDIS publications should be referred to IFAS Communications, as the University has the final say on granting permission.

Educational use is generally granted if the person or organization requesting use publishes a statement crediting UF/IFAS Extension, with the name of the publication and the publication date.

Together with the authors (when possible) IFAS Communications will determine the following:

1. there is no impact on commercial potential of the work itself or any technology being described in the work;
2. that there would be no adverse impact on the EDIS article itself; and
3. that the requesting publication is of acceptable integrity for association with the University

Additional considerations include whether the work includes content that we cannot extend permission to use (such as stock images) and whether the content is completely up-to-date.

Reuse within UF/IFAS

Because EDIS publications are the intellectual property of the University of Florida, there is no legal barrier for use of EDIS publications in support of one's work for UF/IFAS. There may however be issues of plagiarism or academic honesty if the original work is not properly credited.

Fair Use of EDIS Publications

Quoting, linking to, or summarizing portions of EDIS documents is permissible by anyone through the doctrine of Fair Use, and does not require permission. How much and which portions of a work constitute Fair Use is open to interpretation.

Copyright Disputes

Please contact IFAS Communications if you feel that anyone is using UF/IFAS content in violation of copyright, or if there is concern about an EDIS publication.

Best Management Practices for EDIS Publications

Prepared by Diana Hagan for the Task Team for Pesticide Recommendations (December 2018)

The EDIS website makes available all the UF/IFAS numbered publications that are currently supported for use in programs and distribution to clients. This document provides an "Information BMP" plan for Extension faculty, staff and volunteers to follow to provide clients with the most current information. Following these practices will also lead to increased communication with authors and publishing departments so that the information relevant to program needs is kept up-to-date and available.

The EDIS Sunset Review Process

To ensure currency of the content, we have a three-year review policy for fact sheets. Most often, publications are kept online with no changes and will have a "review" date added in the footnote. Frequently the review will lead to revisions in the content. A major revision will require peer-review and will be announced on the EDIS home page and in the bi-monthly EDIS Update newsletter.

An EDIS publication may be archived at any time if the supporting author or reviewer deems it to be out-of-date, no longer relevant, or if it is superseded by another publication. Additionally, a publication may be taken offline if the supporting author does not respond to requests to review it, or if there is no current supporting author and no one can be found to review the material. This process allows us to keep our collection of publications current and relevant, but also occasionally causes needed materials to be taken offline.

BMPs for EDIS Publications

- Do not post copies of EDIS publications on your website or keep local files for using in programs or distributing to clientele. If you do copy from a local file (print or electronic) check to make sure you are using the most current supported version.

  - Agents coordinating Master Gardeners or outlying plant diagnostic clinics should check plant diagnostic clinic files and other remote filing systems periodically to ensure outdated information is not being handed out.

- Link to EDIS when recommending publications. Link to the EDIS topic page instead of posting links of individual publications – that way new publications will automatically be available to your audiences and outdated ones will not become broken links on your site.
- If a publication you need has been archived, you can contact the supporting author (if available) or notify ICS (edis@ifas.ufl.edu) to find out who to contact.

  - Sometimes, the publication can be reviewed and put back online.
  - You may be asked to use a different fact sheet that supersedes the old one.

- If the publication needs revision, you may be able to work with the supporting author or department to bring the content up-to-date. See *Developing Extension Publications for EDIS* (http://edis.ifas.ufl.edu/faq/docs/ DevelopingEDIS.pdf) for more information.

- **Help identify needed content.** If you find you are frequently using publications from regional consortia, other states' Extension agencies, etc., in support of your programs, consider working with the relevant UF/IFAS department or Extension administration to see if we can make the publications available on EDIS. Also contact the department if there is no suitable information available for a program need.
- **Stay informed** of new publications and major revisions by subscribing to the EDIS New Publications Mailing List (EDIS-UPDATE-L) or RSS feed.

Alternatives for Archived Information

There are some ways that you can work with archived material. Copies of all our fact sheets are permanently archived in the UF Digital Collections' Food and Agricultural Sciences collection (http://ufdc.ufl.edu/fao1). You should use this archived pdf link in references and citations, because it will never be updated, like the versions on EDIS are. If you need to cite an EDIS publication that has been taken off of EDIS but you can't find it in the UF library digital collections, contact ICS (edis@ifas.ufl.edu) to have it submitted.

One strategy for publications that have outdated content but have some good information is to create a blog post or a handout that summarizes, adapts, excerpts, or otherwise makes fair use of those portions of the archived publication that you know to be reliable and current, and include the archived material as a reference. You should never refer to

non-supported sources for chemical recommendations, and you should never refer readers to archived material with a "For more information, see …" statement.

Please see the UF/IFAS Blogging Best Practices Guide (http://branding.ifas.ufl.edu/media/brandingifasufledu/ BloggingBestPracticesGuide-3-14-2016.pdf) section on citing sources and avoiding plagiarism and bias for further guidance.

EDIS Sunset Process

The EDIS sunset review process aims to maintain towards a relevant and sustainable collection of numbered publications effectively and at the same time serve the state specialists supporting them, who have many responsibilities vying for their attention.

Twice a year, IFAS communications compiles a list of publications that require review by the publication's contact in order to be retained on the EDIS website. This contact is provided authors a six month notice and then two additional communications informing them of the upcoming sunset deadline.

An affirmative response to retain the publication is required in order to avoid the publication being sunsetted on the designated date. (usually mid January or mid-July) Any sunsetted document may be renewed in the EDIS system if it is determined to still be current and supportable.

All archived EDIS publications will be submitted to the UF institutional repository where they will be indexed for the Food and Agricultural Science Collection and may continue to be accessed for citation purposes.

Due to the large volume of publications that are involved in this process, please use the staff mailbox at EDIS@ifas.ufl.edu for sunset-related correspondence.

Sunset Review Instructions

- Ensure references, resources, contacts and links are current.
- Check affiliations of authors, and let us know of any changes that need to be made.
- If you have the information, provide degree information for former students that have graduated.
- Add a figure or replace low quality figures. User interfaces are increasingly visual, so this is a matter of staying relevant.
- Figure content: please ensure that the content in each figure is relevant, correct, and reflects current information.
- Check the UF/IFAS Assessment for changes in conclusions for non-native plants.

If the publication is no longer relevant or cannot be supported, it should be archived. Please let me know so I can take it off EDIS. Archived EDIS publications are made available in the UF Digital Library's Florida Historical Agriculture and Rural Life Digital Collection < http://ufdc.ufl.edu/flag>.

Author changes

In the past, it has been common to make frequent changes to EDIS publications, but please follow the guidance for revision and authorship in the attribution guidelines (p. **Error! Bookmark not defined.**) This ensures that there will be a citable EDIS article record to document the revised work, and also that revisions are appropriately credited.

If you are making changes to the author by-line of the publication:

- please submit your revised manuscript to https://journals.flvc.org/EDIS;
- Indicate in your comments to the editor that it is an author change, and if it is major or minor revision.
- Your department's review editor will approve the change and send for unit and program leader approval.
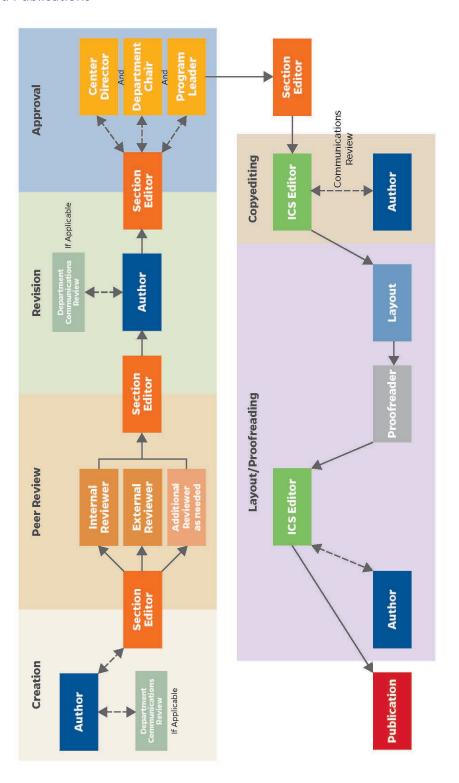
Part 3: The EDIS System

Two Faces of EDIS

This final section of the EDIS handbook provides technical guides for using EDIS. With the use of a Florida OJ journal platform for submission and archives, EDIS now has two faces: the EDIS website presents currently supported publications in an easy-to-navigate public interface for Extension faculty, staff, stakeholders, and clientele. The EDIS journal site on the Florida OJ platform, on the other hand, provides access to current and past EDIS publications as Extension scholarship. This section will give you the tools to make efficient use of these systems and to present yourself and your scholarship most effectively to both audiences.

In this section, find visual guides for navigating the OJS author and reviewer dashboards, diagrams of OJS workflow
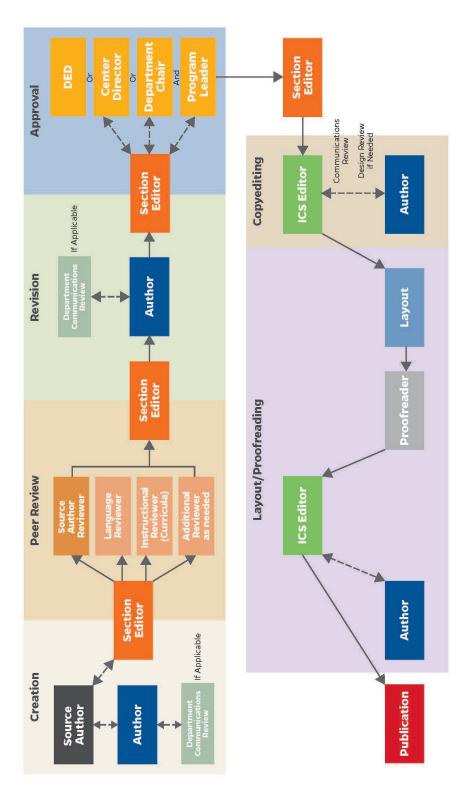
OJS Workflow Diagrams

Peer Reviewed Publications

7/26/18

UF/IFAS EDIS OJS Creative Works Process

IFAS Peer Review

Before EDIS began using Florida OJ platform for handling unit peer review, each unit handled review differently, which led to a number of problems including:

- Confusion for EDIS authors in the face of varying procedures and requirements.
- Lack of uniformity across and within units in the standards for peer review.
- Lack of trust that published EDIS documents have been adequately peer reviewed.
- Barrier to publication for new authors who have to first learn their unit's process and then often solicit their own reviews before submission.
- Manuscripts that get lost somewhere in the departmental review process and never make it to EDIS
- The absence of documentation or metrics

In order to recognize the single, auditable standard of review that is permitted by the OJS platform, submissions which have documented, verifiable peer review in OJS are given the "UF/IFAS peer-reviewed" badge.

Currently, this endorsement appears in the upper right hand corner of the PDF. It will appear in additional places in new EDIS site

The endorsement is not applied to creative works: translations and program materials that are based on peer-reviewed source materials.

It is also typically not applied when a submission has been peer reviewed prior to submission. Qualification for endorsement is determined by the review editor and approvers

OJS3 for EDIS Authors

Adapted from "[Chapter 13: Authoring](#)"
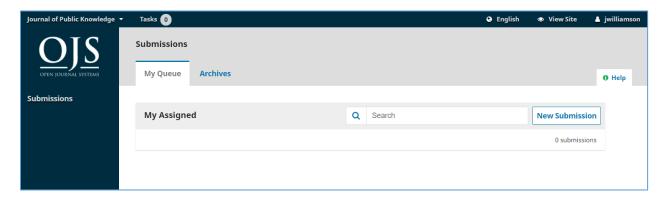in [Learning OJS 3.1: A Visual Guide to Open Journal Systems](#) ([CC BY 4.0](#))

Registering with the Journal

Most UF/IFAS Extension faculty will have had an account created for them. If you do not have an account already, you can register a user account at http://journals.flvs.org/edis and log in (see [Registering with a Journal](#)). Be sure to check the boxes to give yourself both an author and a reviewer role.

If you have reviewed submissions for EDIS or have had a role in another Florida OJ journal you probably already have an account, but you may not have an author role to allow you to submit publications to EDIS. In that case, contact the journal manager to add an EDIS author role to your account.
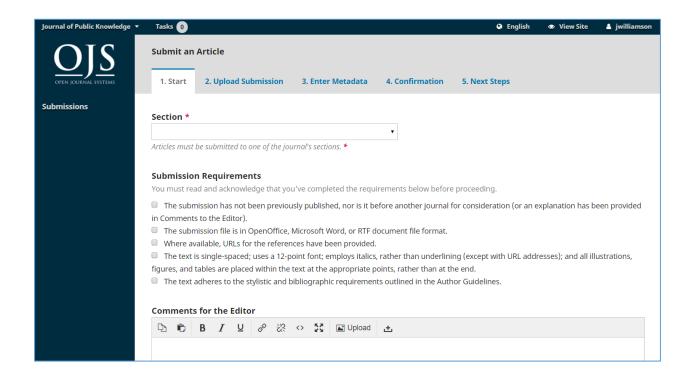
Submitting an Article

Start a new submission by clicking the New Submission button on the right side of the screen. You will be taken to Step 1 of a 5-Step process to upload and describe your submission.

Step 1: Preliminary Information

To begin select the appropriate section for your submission. For regular EDIS fact sheets, select the academic home of the publication's lead author--select the author's REC if it is listed, otherwise choose the academic department. If you aren't sure which section is appropriate, make your best guess. There are special sections for translations and other creative works, management publications, or organism ID publications.

Read and agree to the statements in the submission checklist by checking each box. Include any comments for the editor, read the journal's privacy statement, and then click the Save and Continue button to move to Step 2.
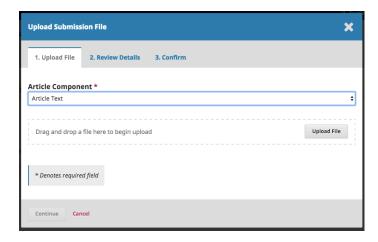
Comments for the Editor

Things to mention in these comments:

- Any deadlines or external factors that the editors & approvers should be aware of
- Recommend peer-reviewers
- Any prior peer-review that should be considered (upload any documentation)
- If a revision, describe what was changed, explanation of author changes
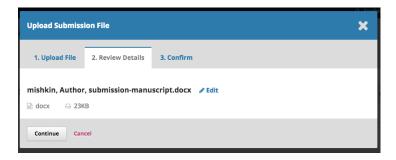- Any related submissions – program materials, translations, or series

Step 2: Upload Submission File

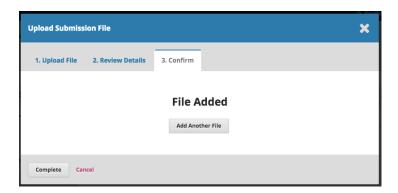On **Step 2**, a window will open allowing you to upload your submission file.

First, you MUST select an Article Component. This lets the system know whether the file is the body of the manuscript, an image, a data set, etc. **This must be selected before your file will upload**.

Once you've made that selection, you can then upload your first file. It is important to note that you can only upload **one** file at a time. Additional files can be uploaded later in the process. Typically, this first file will be the body of your manuscript. Hit the **Continue** button once the file uploads. After uploading the file, you will be asked to review the name of the file. Use the Edit link to make any changes. Click the Continue button.

Next, you have the option to repeat the process to upload additional files (e.g., a data set or an image). Once you have finished uploading your files, click Complete; this will close the upload window.

You will be brought back to the Submit an Article screen where you will see the files you've uploaded. If you need to make changes, expand the blue arrow to the left of your file and make any changes using the Edit link. Click 'Save and Continue' to move to Step 3.

Step 3: Enter Metadata

On Step 3, you will be asked to add more information about the submission, including the title of the submission (broken down into prefix, title, and subtitle), the abstract, and scrolling down…
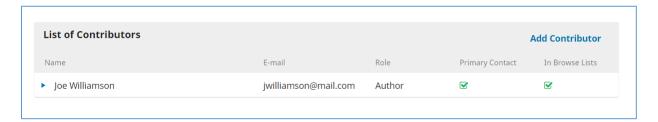

…any additional contributors.

You can add more contributors (e.g., co-authors), by clicking the **Add Contributors** link. This will open a new window with fields to enter their information.

Before starting it is helpful to have the following information about your co-authors:

- Full name as it will appear on the finished publication
- Email address
- ORCID (if they have one)
- Affiliation if not "University of Florida"
- Bio: job title and department; center name and location or "UF/IFAS Extension, Gainesville FL 32611"

Hit **Save**, and the new contributor will appear on the screen.

Submission Metadata

These fields are optional and will be edited before publication. They enhance a Dublin Core record embedded in the publication to improve indexing and findability.

Coverage Information
The spatial or temporal topic of the submission, the spatial applicability of the resource, or the jurisdiction under which the resource is relevant. e.g., Alachua (county), Florida (state), 2017-2018. For Place names, recommended authority is Getty Thesaurus of Geographic Names® (TGN). Other relevant types of coverage: USDA Plant Hardiness Zone or Extension Administrative Districts

Type
Almost always "text" but may be "image"

Source
- For revisions, identify the version being updated by DLN & Date, submission ID or DOI

- For program materials, identify the source by EDIS DLN or by URL

Rights

All EDIS publications are copyright UF/IFAS. Enter a brief statement about any content that is used with permission or licensed for use as part of this submission.

Additional Refinements

For each of these fields, type a word or phrase and hit your Enter key. Tab to move to the next

field.

Languages

Best practice is ISO 639-1 code: You may enter "en" for English, "es" for Spanish, "ht" for Haitian Creole

SubjectS

Use EDIS Topics, e.g., "Insect Pests in Florida Lawns" or "Mushrooms"

Discipline(s)

Academic specialties(s) of the submission, e.g., "Turfgrass Entomology" or "Mycology"

Keywords

Specific keywords that will help users find this publication.

Supporting Agencies

Enter agencies supporting the submission if appropriate.

Click **Save and Continue** to move forward.

Step 4: Confirmation

On Step 4, you will be asked to confirm that you are happy with your submission.

Click **Finish Submission**.

A box will pop up asking you to confirm you are finished. Click **OK**.

Step 5: Next Steps

Your submission is now complete! The editor has been notified of your submission. At this point, you can follow the links to review this submission, create a new submission, or return to your dashboard.

Once you complete a submission, you cannot make changes to it. If you want to replace the file you submitted or make other changes to the submission, you will need to contact the editor through the Pre-Review Discussions tool.

Dashboard

And here is your submission in your Dashboard. You can see from the red cartouche that it is currently in the *Submission* stage. Your submission also appears on your unit editor's dashboard, waiting for them to look over your submission. Contact them or the journal editor directly if there is a delay at this stage, in case there is a miscommunication.

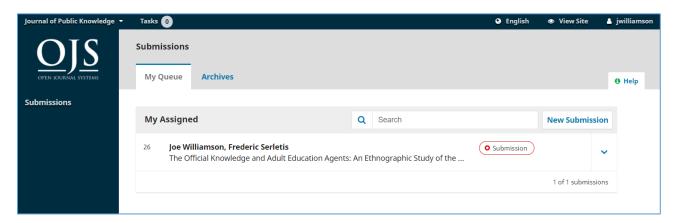Over the coming days, it will move into the Review stage, which for EDIS publications has an additional round of administrative review by approvers for the publishing REC (if appropriate), Department, and Extension Program. If accepted after peer review and administrative approval, the submission moves into the Copyediting and Production stages before being published.

Responding to a Review

Once the review process has completed, you will be notified via email by the editor of their decision.

After receiving the email, login to your dashboard.

Select the *Review* link next to your submission to view the decision.

From here, you can see the decision (revisions requested) and a link to the editor's notification.

Notifications ✕

[JPK] Editor Decision

2016-08-30 08:32 PM

Apostolos Mishkin, Frederic Serletis:

We have reached a decision regarding your submission to Journal of Public Knowledge, "approach for externalization of expert tacit knowledge".

Our decision is: Revisions Required

Stephanie Berardo
University of Toronto
sberardo@mailinator.com

Reviewer A:
This is a very good article.

Based on the information in the editor's message, you must now prepare your revisions.
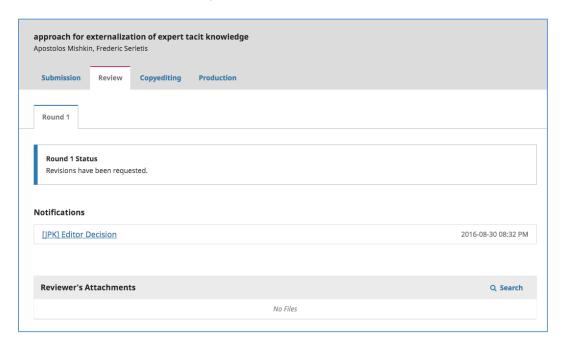
Uploading the Revised File

By scrolling down the page, you will find a panel for **Revisions**.

Round 1 Status
Revisions have been requested.

Notifications

[JPK] Editor Decision   2016-08-30 08:32 PM

Reviewer's Attachments   🔍 Search

No Files

Revisions   🔍 Search   **Upload File**

No Files

Review Discussions   **Add discussion**

Name   From   Last Reply   Replies   Closed

No Items

Use the *Upload a File* link to upload your revised manuscript. This is just like the original submission file upload utility

Your revised file is now visible in the Revisions panel.

Revisions   Q Search   Upload File

▶   📄 164-1   Author, submission-manuscript.docx   Article Text

Inform the Editor

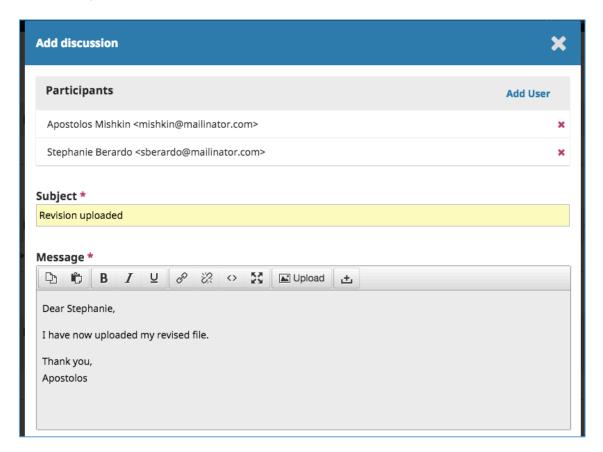The editor will receive a notification about the new file(s) being uploaded. Additionally, you can inform the editor via the Review Discussion panel as explained below.

Review Discussions   Add discussion

Name   From   Last Reply   Replies   Closed

                                            No Items

From there, select the *Add Discussion* link.

Add discussion   ✕

Participants   Add User

Apostolos Mishkin <mishkin@mailinator.com>   ✕

Stephanie Berardo <sberardo@mailinator.com>   ✕

Subject *
Revision uploaded

Message *

[🗐 📋 **B** *I* U̲ 🔗 ⚯ <> ⛶ 🖼 Upload ⬆]

Dear Stephanie,

I have now uploaded my revised file.

Thank you,
Apostolos

Use the *Add User* link to add the editor.

Add a subject line and a message.

Hit **OK** to send the message.

An email has now been sent to the editor and you (and the editor) can see the message in the Review Discussions panel.

Review Discussions				Add discussion
Name	From	Last Reply	Replies	Closed
▸ Revision uploaded	mishkin Aug/30	-	0	☐

At this point, the author needs to wait to hear back from the editor as to whether the revisions are acceptable.

Resubmitting for Review

It may be necessary to resubmit your revision for an additional round of peer review.

EDIS administrative approval constitutes a round of review(s) post-peer review.

The peer review process will be repeated, and you will likely receive additional revisions to make. Once these are completed and accepted, you will then be moved to the next stage.
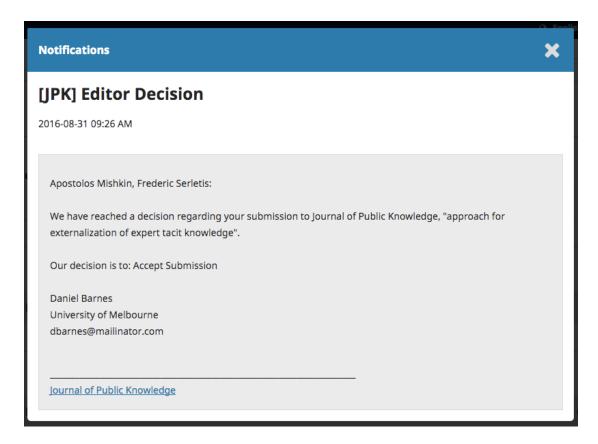
Revisions Accepted

You will receive an email that your revisions have been accepted.

In addition, notifications will appear on your dashboard.

| Submission | Review | Copyediting | Production |

Round 1

Round 1 Status
Submission accepted.

Notifications

[JPK] Editor Decision	2016-08-30 08:32 PM
[JPK] Editor Decision	2016-08-31 09:26 AM

The later notification is the current one. Click on it to open the message (which is the same as the email you would have also received).
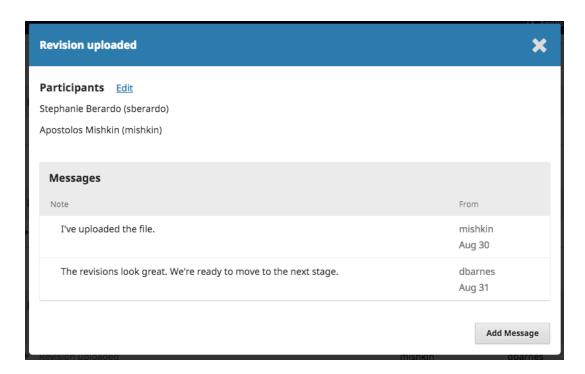
Use the **X** in the upper right corner to close the window.

Further down your dashboard, you will also see a discussion reply from the editor.

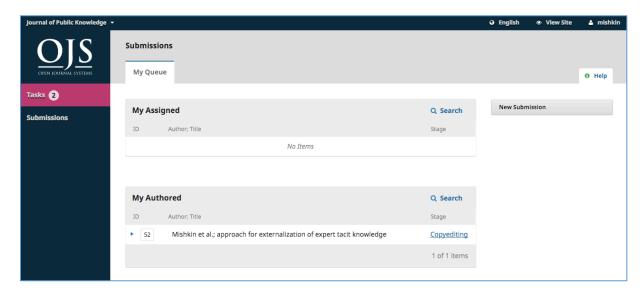Clicking the discussion title will open it up.

Congratulations! You've been accepted and your submission file is moving on to the Copyedit stage. **NOTE:** In EDIS there are often author revisions after peer review and before the administrative approval stage, in which case the next step will be an additional round of administrative review, repeating the steps above. Then the submission will move on to copyediting.

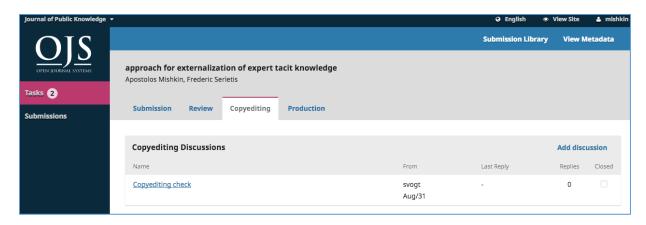## Copyediting Workflow: responding to a Copyediting Request

Note that when the submission passes to copyediting, it moves off the desk of your unit editor and onto the desk of your unit's ICS Editor. If there is a delay at this point, contact your ICS editor in case there has been a miscommunication. They typically work on submissions on a first in, first out basis.

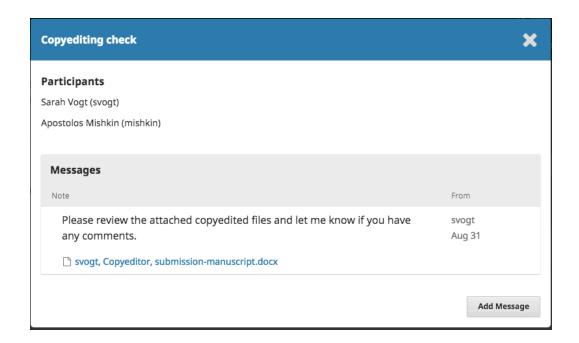The next step in the workflow is to inspect your submission files that have been copyedited.

You will receive an email indicating that files are available. To see them, login to the journal and go to your dashboard.
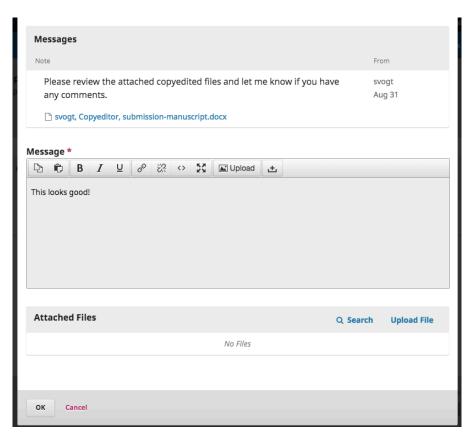

You can see your entry in the My Authored panel. Select the Copyediting link to go to the full submission record, including the notification in the Copyediting Discussions panel.

Click on the linked discussion to open it, read the message, and open the attached file.

Once you have read the attached file, you can respond to the copyeditor indicating any required changes or your approval.

If needed, you could attach a revision, but for this example we will simply approve the changes and hit OK.

On your dashboard, you can see that you were the last person to reply to the message.

Your role in the copyediting process is now complete and you can wait for the request to proofread the final galleys (e.g., PDFs, HTML, etc.) before publication.

Responding to a Proofreading Request

The next step in the workflow is to inspect your submission files that have been converted into galleys (e.g., PDF, HTML, etc.).

You will receive an email indicating that files are available. To see them, login to the journal and go to your dashboard.

You can see your entry in the My Authored panel. Select the Production link to go to the full submission record, including the notification in the Production Discussions panel.

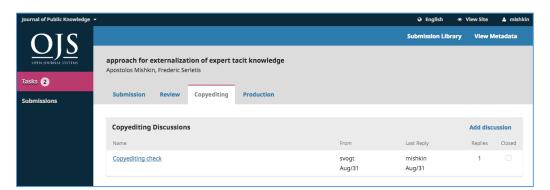Click on the linked discussion to open it, read the message, and open the attached file.

Once you have read the attached file, you can respond to the Layout Editor indicating any required changes or your approval.

That's it! Your role in the editorial workflow is now completed.

OJS For Reviewers

Adapted for use by EDIS reviewers from "Chapter 15: Reviewing" in *Learning OJS 3.1: A Visual Guide to Open Journal Systems* (CC BY 4.0)

As a reviewer, you will learn of the review request via email or by checking your dashboard at http://journals.flvs.org/edis:

From the My Assigned list, find the title and Review link. This image is of a double-blind peer review process. In EDIS, you will see the authors names listed in bold above the title. The EDIS site is configured to conceal reviewer identities from the author, but show the authors names to reviewers.

Selecting the Review link will take you to the first review step in the submission record.

Review: *approach for externalization of expert tacit knowledge*

| 1. Request | 2. Guidelines | 3. Download & Review | 4. Completion |

Request for Review

You have been selected as a potential reviewer of the following submission. Below is an overview of the submission, as well as the timeline for this review. We hope that you are able to participate.

Article Title

approach for externalization of expert tacit knowledge

Abstract

E-learning or electronic learning platforms facilitate delivery of the knowledge spectrum to the learning community through information and communication technologies. The transfer of knowledge takes place from experts to learners, and externalization of the knowledge transfer is significant. In the e-learning environment, the learners seek subject expertise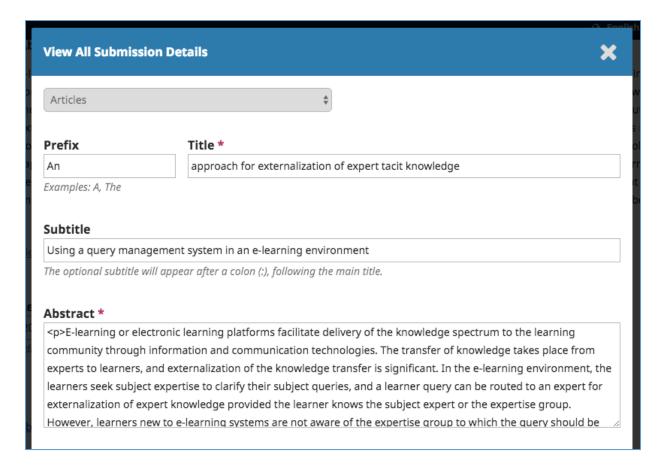 to clarify their subject queries, and a learner query can be routed to an expert for externalization of expert knowledge provided the learner knows the subject expert or the expertise group. However, learners new to e-learning systems are not aware of the expertise group to which the query should be sent, which results in time delays, non-response, inaccurate solutions and loss of knowledge capture. Several models have been proposed to resolve this task, but thus far, these efforts have focused completely on returning the most conversant people as experts on a particular topic to retrieve valuable knowledge. To address this problem, we propose an approach that externalizes the tacit knowledge of a subject expert by creating a dynamic query handling system that automatically transfers a user query to the best subject expert.

This first step consists of the following sections:

- **Request for Review**: provides some text inviting you to act as a reviewer.

- **Article Title**: provides the title of the article.

- **Abstract**: provides the abstract text.

Further down the screen, you will find additional information.

View All Submission Details

Review Schedule

| 2016-08-30 | 2016-09-20 | 2016-09-27 |
| Editor's Request | Response Due Date | Review Due Date |

About Due Dates

| Accept Review, Continue to Step #2 | Decline Review Request |

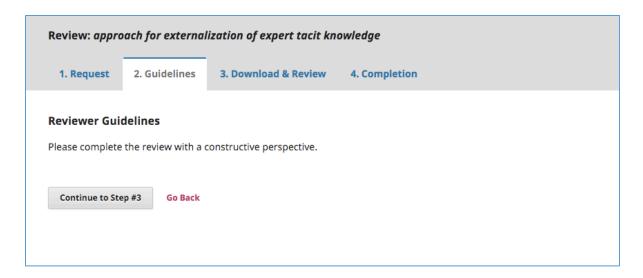The **View All Submission Details** link will open a window with additional information, including all the metadata:

View All Submission Details

Articles

Prefix

An

Examples: A, The

Title *

approach for externalization of expert tacit knowledge

Subtitle

Using a query management system in an e-learning environment

The optional subtitle will appear after a colon (:), following the main title.

Abstract *

<p>E-learning or electronic learning platforms facilitate delivery of the knowledge spectrum to the learning community through information and communication technologies. The transfer of knowledge takes place from experts to learners, and externalization of the knowledge transfer is significant. In the e-learning environment, the learners seek subject expertise to clarify their subject queries, and a learner query can be routed to an expert for externalization of expert knowledge provided the learner knows the subject expert or the expertise group. However, learners new to e-learning systems are not aware of the expertise group to which the query should be

Note that none of these fields are editable by the reviewer. They are only provided to help you conduct a thorough review.
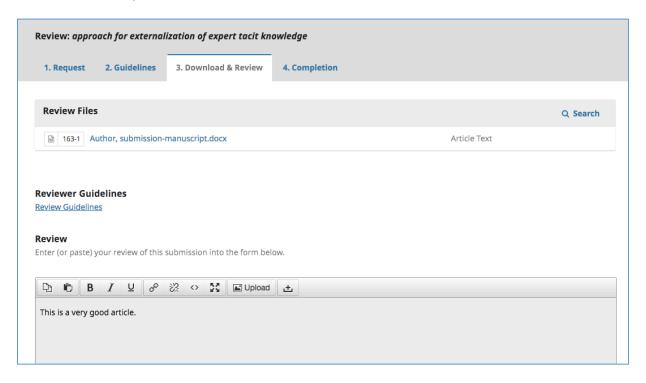
Close this window and move further down the screen. From here you can see the Review Schedule, including all the relevant due dates.

From here, you can decline or accept the review. If you decline, you will be dropped from the process. If you accept, you will move to review step 2, where you would be able to read any reviewer guidelines provided by the journal.
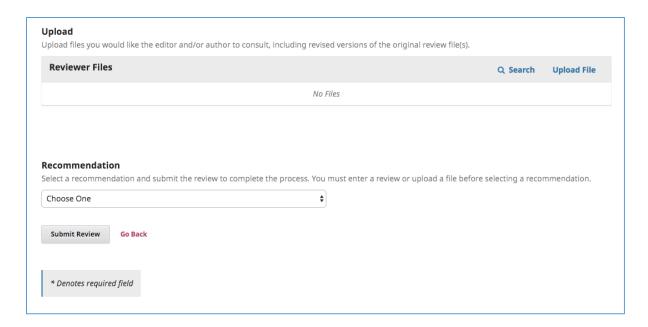
NOTE: In compliance with the EU GDPR regulation, you must check the box agreeing to have your data stored and collected according to our privacy statement to continue in the process.

Review: *approach for externalization of expert tacit knowledge*

| 1. Request | 2. Guidelines | 3. Download & Review | 4. Completion |

Reviewer Guidelines

Please complete the review with a constructive perspective.

Continue to Step #3   Go Back

Hit **Continue** to move to step 3. From here you can download a copy of the review files and enter your review comments. The first window is for comments to the editor and the author; the second window is just for the editor.

Review: *approach for externalization of expert tacit knowledge*

| 1. Request | 2. Guidelines | 3. Download & Review | 4. Completion |

Review Files   Q Search

163-1   Author, submission-manuscript.docx   Article Text

Reviewer Guidelines
Review Guidelines

Review
Enter (or paste) your review of this submission into the form below.

This is a very good article.

Once you have read the paper and added your comments, scroll down the page to optionally upload a marked-up copy of the review file (to keep your review anonymous, remember to strip any personal identification from the file before uploading it).

Next, you **must** make your recommendation using the dropdown menu. Your choices include:

- **Accept Submission**: it is ready to go to Copyediting as is.

- **Revisions Required**: it requires minor changes that can be reviewed and accepted by the editor.

- **Resubmit for Review**: it requires major changes and another round of peer review.

- **Resubmit Elsewhere**: it doesn't seem like a good fit for the focus and scope of this journal.

- **Decline Submission**: it has too many weakness to ever be accepted.

- **See Comments**: if none of the above recommendations make sense, you can leave a comment for the editor detailing your concerns.

Finally, hit the Submit Review button to complete your task. You'll be asked to confirm. Until you confirm the review, the system will consider you to still be working on it.

Hit OK. You will be taken to the final confirmation screen thanking you for your work.

Review: *approach for externalization of expert tacit knowledge*

1. Request   2. Guidelines   3. Download & Review   **4. Completion**

Review Submitted

Thank you for completing the review of this submission. Your review has been submitted successfully. We appreciate your contribution to the quality of the work that we publish; the editor may contact you again for more information if needed.

That's it! The review is now complete.

EDIS Journal Site
https://journals.flvc.org/edis

Digital Object Identifiers

(Adapted from Public Knowledge Project https://docs.pkp.sfu.ca/doi-plugin/en/chapter1)

What Are DOIs?

A "Digital Object Identifier" (DOI) is a **globally unique identifier** for digital objects. In the OJS context such objects can be journals, journal issues, journal articles and supplementary files – but for EDIS we will be assigning DOIs to each EDIS publication and each revision that is published through OJS. DOIs are used for the global, persistent identification of objects like EDIS publications. For example, a DOI in a citation would provide the user with a persistent link to the article page on the EDIS journal site. DOIs are associated with one or several URLs that can be resolved through a persistent URL at a global re-direction domain (http://dx.doi.org/some-doi) Additional metadata about certain types of digital objects can be stored in databases of specialized DOI registration agencies. This enables discovery of these objects through the websites of the **registration agencies** or their partners (e.g. scientific search engines).

How does the DOI system work?

DOIs are composed of a **prefix** and a **suffix** which are separated by a slash (e.g. "10.1234/cdb2011-01-bio234"). EDIS shares a prefix under the UF Libraries account with Crossref, which is **10.32473**. We then assign our own suffixes during the publishing process, but must ensure that no suffix will be repeated (e.g. "cdb2011-01-bio234" in the above example).

Once ICS editors have assign DOI suffixes to EDIS publications, the DOI composed of prefix and suffix has to be registered with the registration agency. The Scholarly Repository Librarian submits them to Crossref using the UF Libraries' credentials. Metadata corresponding to the publication is then formatted for registration and transmitted as an XML file to Crossref together with the DOI and the corresponding URL of the publication object. As of February 2020, the cost for DOI registration is being supported by the UF Libraries.

What is Crossref?

Crossref is the official DOI link Registration Agency for the International DOI Foundation. It was founded as a cooperative effort by journal publishers to enable cross-publisher citation linking for online academic journals.

Crossref created their own XML schema for DOI registration known as the Crossref Deposit Schema.

ORCID

ORCID is an independent non-profit organization that provides a persistent identifier – an ORCID iD – that distinguishes you from other researchers and a mechanism for linking your research outputs and activities to your iD. ORCID is integrated into many systems used by publishers, funders, institutions, and other research-related services. Learn more at orcid.org.

Making linked data work for you

EDIS publications and major revisions will be assigned a Digital Object Identifier (DOI) in OJS and they will be registered with Crossref

- Use your EDIS article's DOI as the link in citations (not the EDIS url)

- Include DOIs when available in your EDIS article reference lists.
  Lookup: https://apps.crossref.org/simpleTextQuery

- Register for an ORCID ("Open Researcher and Contributor Identifier") ID and make sure it's included in your author metadata in submissions (https://orcid.org)

- These unique identifiers can be used to identify you and your connection to your EDIS works in a multitude of ways and environments.

EDIS Website and Taxonomy
https://edis.ifas.ufl.edu

EDIS Topic Pages

- EDIS topic "map" is a taxonomy of topics that is navigable on the EDIS website via topic pages.

- A small amount of text can be added under the topic heading.

- It is best practice to link to an EDIS topic instead of compiling lists of publications

- Got suggestions or issues? Contact Diana.

Finding Things on EDIS

- **Search box** (upper right corner): Google Custom Search – good for most purpose try dropping in DLN or IPN to get to a publication fast

- **Advanced Search** (top nav bar): searches EDIS management database – includes archived publications as well as online. Only searches fields of metadata, not full text.

- **Navigate by topic**

  - [Fruit and Nut Index A-Z](#)

  - [Specific Vegetables A-Z](#)

  - [Wildlife A to Z](#)

  - [Alphabetical Author Index](#)

Your EDIS Author Page

- A kind of topic page.

- Contains your bio (from publication footnote, directory, and/or department profile)

- Dynamic list of publications (new publications added)

- Links to the publications, publications have links back

Contact Diana for any needed change.

Web analytics

- EDIS web year is November 16 through November 15.

- The urchin logfile data are cleaned and uploaded to the SQL database.

- Access via search form EDIS website at http://edis.ifas.ufl.edu/stats.html.

- Need more analytics? Get access to EDIS Google Analytics account.

OJS Reporting

- # of publications reviewed

Emerging Tech: EDIS Authors Teams Site

- IFAS-EDIS Authors: 10mo4ns

- Features

    - Documentation for authors

    - Channel links to EDIS Website and OJS site

    - EDIS publication planner template

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