

# INSTRUCTIONS TO USE THE WEB EDITOR SERIAL ARTICLE WORK 2.0

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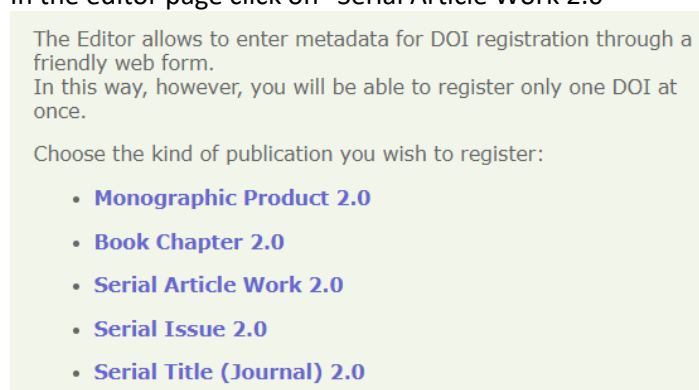
## Create a new DOI

We recommend all new users, and users that need to register only a limited number of DOIs each year, to start registering using the Web editor, a simple form where you can input the data of each article manually.

1. Go to <https://www.medra.org>
2. On the right side of the home page there is the “Registered Users” menu. Click on the second link “Register DOIs”
3. Now you need to log in with your credentials
4. Once logged in, you must choose the tool for DOI registration: click on “Editor”



5. In the editor page click on “Serial Article Work 2.0”



6. The web form of the Editor will open. It consists of different tabs: **Message information, DOI, Journal, Article, Relations, Citations, Confirm.** Each contains the metadata field to be filled in. Mandatory fields are marked with an \* moreover there are controls for each field that prevents you to enter wrong data. Following some guidance on how to fill the field in each tab.

7. **Message information:** this info is not part of the metadata but is used by mEDRA system to orchestrate the registration.

The screenshot shows a web interface for the 'MESSAGE INFORMATION' section. At the top, there is a breadcrumb trail: 'Home > Registered Users Area > DOI Registration > Editor > Serial Article Work 2.0'. Below this is a navigation bar with links: 'MESSAGE INF.', 'DOI', 'JOURNAL', 'ARTICLE', 'RELATIONS', 'CITATIONS', and 'CONFIRM'. The 'MESSAGE INFORMATION' section is highlighted. It contains a form with the following fields and options:

- \* From company: [text input field]
- \* From email: [text input field]  
(address which will receive registration result)
- DOI registrant: [text input field]  
(if different from Company name)
- ☐ Send to Crossref

The most important field is “From Email” because it will be the address where we will send the results of the registrations, it can be the same e-mail address of the logged in user, or a different one. It is important that this address can be read by the person actually registering the DOIs (see point 15 below).

Tick the checkbox “send to Crossref” only if you have been enabled to the additional service to deposit your DOIs also on Crossref platform.

8. **DOI:** this section allows you to create the DOI and choose where it resolves.

| DOI DATA                                                         |
|------------------------------------------------------------------|
| <p>* DOI:</p> <input type="text"/>                               |
| <p>Please see the <a href="#">Guidelines on DOI creation</a></p> |
| <p>* URL:</p> <input type="text"/>                               |

| SIMILARITY CHECK DATA                      |
|--------------------------------------------|
| <p>CRAWLABLE URL:</p> <input type="text"/> |

| ACCESS INDICATORS                                                                                   |
|-----------------------------------------------------------------------------------------------------|
| <p><input checked="" type="checkbox"/> OA - Open Access</p> <p>OA License:</p> <input type="text"/> |

| FUNDING INFORMATION                                                                    |
|----------------------------------------------------------------------------------------|
| <p>Funder Name:</p> <input type="text"/>                                               |
| <p>Funder Identifier ( <a href="#">Open Funder Registry</a>):</p> <input type="text"/> |
| <p>Award Number:</p> <input type="text"/>                                              |
| <p><a href="#">Add Funding Information</a></p>                                         |

**DOI:** here you have to input the DOI you have decided for each article.

The DOI is made of prefix/suffix. The prefix is the one assigned by us (ex 10.1234) while you can freely choose the suffix.

We suggest you agree on a method for generating suffixes: for example it could be issn.articlenumber or JournalAcronym.year.articlenumber) or the method you find more suitable.

**Resolution URL:** the actual URL where the content can be accessed and needs to be different for each article. It can be a web page with some article metadata and a link to the pdf (preferred) or the link to the pdf itself.

Please DO NOT enter <https://doi.org/{doi}> or <https://www.medra.org/{doi}> in the resolution URL.

**Crawlable URL:** users depositing DOIs also on Crossref are encouraged to provide the URL of the full text of the article, for the Similarity Check service to index the content and make it part of the comparison database.

**Access indicators:** a flag that, if checked, indicates that the article is available in Open Access. It is recommended if the content is available in OA, as it supports operations of metadata aggregators such as OpenAIRE. Optionally it is possible to include the URL of the OA license applied.

**Funding information:** Name and unique identifier of the institution that provided funding to the research or the publication.

9. **Journal**: this section is divided in three parts: journal data, issue data and publisher data.

**Journal data**: here you have to fill in metadata about the Journal title itself, the title, the issn for the print version and/or for the online journal.

**JOURNAL DATA**

\* Distinctive Journal title:

Subtitle:

Abbreviated Journal title:

**ISSN and other identifiers**

ISSN (Print):

Product form:

ISSN (Digital):

Product form:

Electronic format:

Journal DOI

In case of journals without ISSN, for those enabled to Crossref additional services, you must first register first a DOI at journal title level and include it in the article metadata. The system checks that the DOI at journal title level exists and has been registered.

**Journal DOI**

**i** In case of journals without ISSN, the journal level DOI is required.  
**Attention: the journal level DOI must be registered first.**

DOI:

Proprietary ID:

Product form:

Electronic format:

**Issue data:** here you have to fill in the data on the issue or volume of the journal where the article is published.

ISSUE DATA

Journal volume number:

Journal issue number:

Other designation:

\* Journal issue date:

YYYYMMDD

**Publisher data:** the usual data on publisher and country of publication

PUBLISHER DATA

\* Publisher name:

ISNI:

Imprint name:

\* Country of publication:

10. **Article**: these are the data specific to each article, the more you fill in the better.

**Article data:** The title, the language of the article, the first page number and the year of publication are mandatory. To enter a language, select it from the drop-down menu. You can also add other languages by clicking on the Add Other Language button. For articles published online only without page numbering or online first, include “1” as first page number and if necessary, update it once published with page numbering.

**ARTICLE DATA**

\* Title:

Title Language:

Subtitle:

\* Language:

Add Other Language

\* First page number:

Last page number:

Number of pages:

\* Publication date:  
 -  -  (\* YYYY-MM-DD)  
(\* year only)

**Abstract:** it is recommended to include at least one abstract. In case of abstracts provided in multiple languages, please use add two or more abstracts (add Other Text) and use the language field to express the respective languages.

Abstract

Abstract Language:

Add Other Text

**Copyright data:** (optional) the default “No copyright info” does not mean that there is no copyright, only that info is not provided. For Open Access article, use the OA flag in the DOI tab.

**COPYRIGHT DATA**

☐ No copyright info ☒ Copyright info

\* Copyright year:

Copyright owner: ☒ Person ☐ Corporate

\* Name:

Add Copyright Owner

**Contributor Data:** this is an important part, please also enter the ORCID of each author if you know it (you can search it on <https://orcid.org>), in addition to name (first name) and surname (last name). Also enter the Affiliation of the author, namely the name of the institution and if available the ROR ID of the institution (you can search it on <https://ror.org>). You can enter as many authors and contributors as you wish by clicking on Add contributor button. It is recommended entering the principal author first.

**CONTRIBUTOR DATA**

☒ Enter a contributor ☐ Various Authors ☐ Unknown ☐ Anonymous ☐ No Contributors

First Author

\* Type:  
☒ Person ☐ Corporate

Full name:  
First name:

\* Last name:

ORCID:

ISNI:

Affiliation

Professional position:

Institution Name:

Institution ROR:

Add contributor

11. **Relations:** (optional) relations that the article has with other publications.

MESSAGE INF. DOI JOURNAL ARTICLE **RELATIONS** CITATIONS CONFIRM

**Related Work**

Related work code:

Work identifier type:

Work identifier value:

Add Related work

**Related Product**

Related product code:

Product identifier type:

Product identifier value:

Add Related product

12. **Citations** (optional, required only if you also deposit the DOI on Crossref via mEDRA)

**CITATIONS DATA**

**Add Citation**

Clicking on Add Citation you can add the reference list of the article on which you are registering the DOI in different ways.

**Citation of an article by metadata**

**Add citation**

Type : ☒ ARTICLE ☐ Book ☐ DOI ☐ Unstructured

**Article data**

\* First Author: ☒ Person ☐ Corporate

\* Name:

Article Title:

\* First Page:

DOI:

**Journal data**

\* Journal Title:

Volume number:

Issue number:

Other designation:

\* Journal issue date:

\* Date:

ISSN:

**Add citation** **Close**

**Citation of a book, by metadata**

**Add citation**

Type : ☐ ARTICLE ☒ Book ☐ DOI ☐ Unstructured

**Book data**

\* First Author: ☒ Person ☐ Corporate

\* Name:

\* Book Title:

First Page:

Book data:

\* Publication Date:

ISBN:

DOI:

**Series data**

Series Title:

Number within series:

ISSN:

**Add citation** **Close**

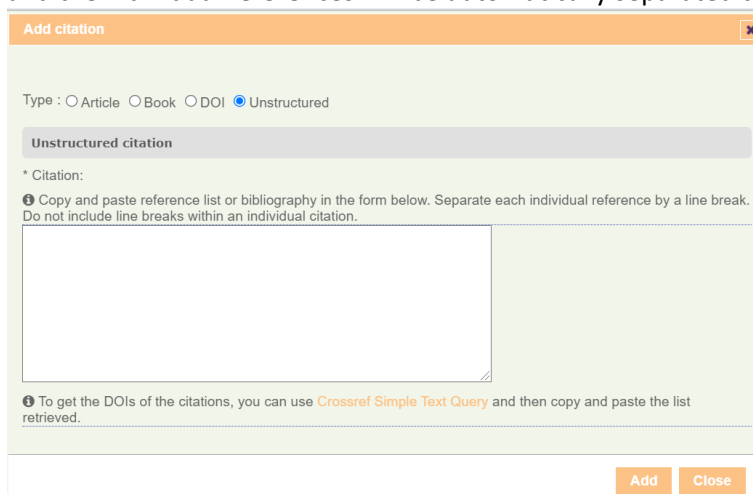
## Citation of any content, knowing its DOI



The 'Add citation' dialog box has an orange header with a close button. Below the header, the 'Type' section contains four radio buttons: 'ARTICLE', 'Book', 'DOI' (which is selected), and 'Unstructured'. A grey bar labeled 'DOI data' is positioned below the radio buttons. Under this bar is a text input field labeled '\* DOI:'. At the bottom of the dialog are two orange buttons: 'Add citation' and 'Close'.

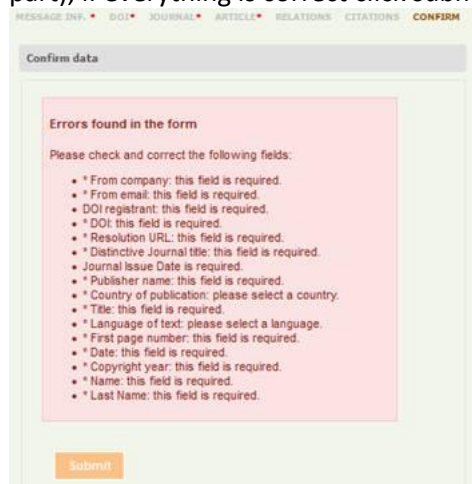
## Citation of any content as unstructured bibliography

Copy and paste the reference list or bibliography in the form below, separating each individual reference by a line break. Do not include line breaks within an individual citation. Then click Add and the individual references will be automatically separated to be deposited.



The 'Add citation' dialog box features an orange header with a close button. The 'Type' section shows four radio buttons: 'Article', 'Book', 'DOI', and 'Unstructured' (which is selected). A grey bar labeled 'Unstructured citation' is located below the radio buttons. Under this bar, the text '\* Citation:' is followed by an information icon and the instruction: 'Copy and paste reference list or bibliography in the form below. Separate each individual reference by a line break. Do not include line breaks within an individual citation.' Below this text is a large, empty text area with a small icon in its bottom right corner. At the bottom of the dialog, another information icon is followed by the text: 'To get the DOIs of the citations, you can use [Crossref Simple Text Query](#) and then copy and paste the list retrieved.' At the very bottom of the dialog are two orange buttons: 'Add' and 'Close'.

13. **Confirm:** the tab confirm will show you if there are any error to correct before submitting (red part), if everything is correct click submit and the registration will start



Confirm data

Errors found in the form

Please check and correct the following fields:

- \* From company: this field is required.
- \* From email: this field is required.
- \* DOI registrant: this field is required.
- \* DOI: this field is required.
- \* Resolution URL: this field is required.
- \* Distinctive Journal title: this field is required.
- \* Journal Issue Date is required.
- \* Publisher name: this field is required.
- \* Country of publication: please select a country.
- \* Title: this field is required.
- \* Language of text: please select a language.
- \* First page number: this field is required.
- \* Date: this field is required.
- \* Copyright year: this field is required.
- \* Name: this field is required.
- \* Last Name: this field is required.

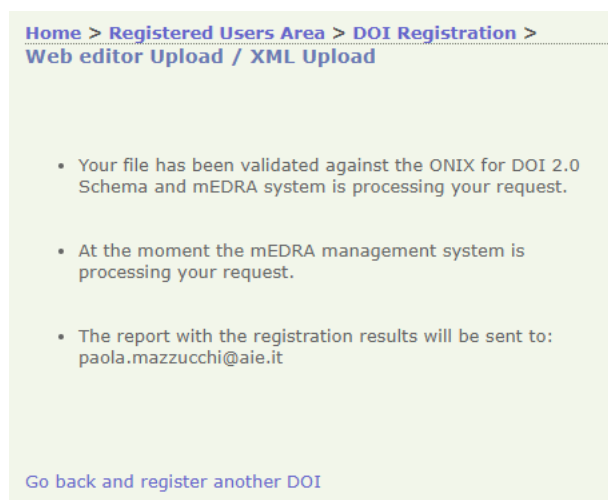
Submit

14. Once submitted, you will be presented with a confirmation page that the file has been validated against the schema (unless there are some strange errors in which case you will get an error message)
15. The results of registrations will be sent by e-mail to the e-mail indicated in the field FromEmail in the message information tab (point 7 above).  
If it is a SUCCESS>do nothing, it's all fine.  
If it is a FAILURE, a link in the mail will take you to the explanation of the error.
16. In any case you can see the results of the registrations also online clicking on Monitoring and then Submission history DOI

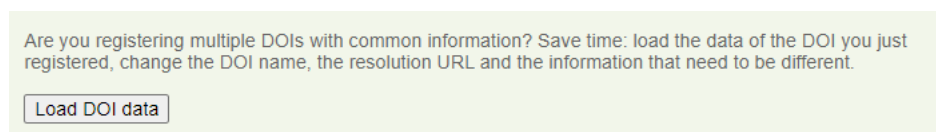
## Create DOIs for multiple articles for the same Journal Issue

If you need to register DOIs on all articles in the same Journal Issue, you do not need to input manually the Journal and Issue data, that are common to all articles.

Create the DOI for the first article, then upon confirm and submission click on the link “Go back and register another DOI” at the bottom of the confirmation page as in 14.



A new web editor will open on the Message information tab, but you will also be presented at the bottom with an additional text and a **Load DOI data** button



Click on the **Load DOI data** button, the web editor will be filled in with all the data of the previous DOI in edit mode.

Leave the data in the Journal tab as they are and change all the other article specific data.

Remember to change the DOI and the Resolution URL.

## Update an existing DOI

17. To update a DOI already registered, just go to the Editor page (point 4-5 above) and use the “**Update a DOI with the Editor**” box. Input the DOI you want to update and click the Update button. The same web form as above will open but with all the metadata you entered, ready for you to change, add, etc. Modify the metadata and then go to Confirm tab as in point 13 above.



The screenshot shows a web form titled "Update a DOI with the Editor" in an orange header bar. Below the header, there is a label "DOI" followed by a white text input field. To the right of the input field is an orange button labeled "Update".

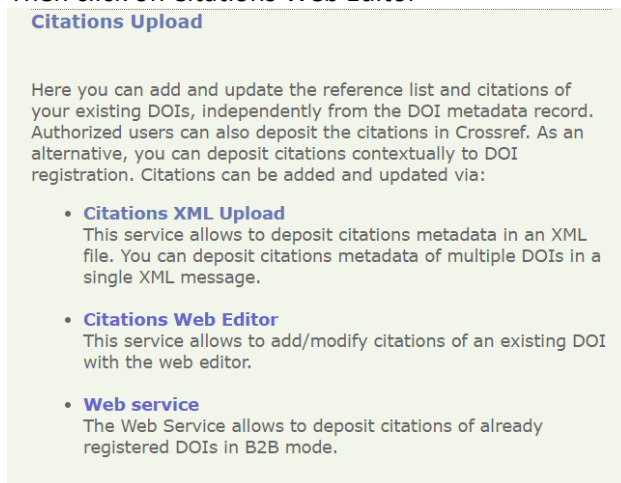
## Add citations to an existing DOI

To add the list of citations to an existing DOI, it is possible to use either the Web editor Serial Article Work 2.0 as in 17, or to use the **Citations Web Editor**.

18. Click on the Citations Deposit link in the Registered Users menu

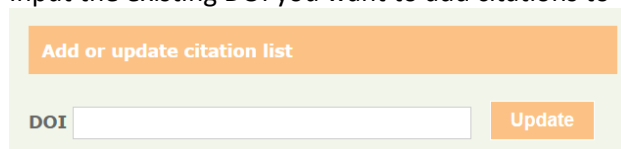


19. Then click on Citations Web Editor



The screenshot shows a page titled "Citations Upload" in blue. Below the title, there is a paragraph of text: "Here you can add and update the reference list and citations of your existing DOIs, independently from the DOI metadata record. Authorized users can also deposit the citations in Crossref. As an alternative, you can deposit citations contextually to DOI registration. Citations can be added and updated via:". Below the paragraph, there is a list of three items: "Citations XML Upload", "Citations Web Editor", and "Web service". Each item has a brief description of its function.

20. Input the existing DOI you want to add citations to



The screenshot shows a web form titled "Add or update citation list" in an orange header bar. Below the header, there is a label "DOI" followed by a white text input field. To the right of the input field is an orange button labeled "Update".

21. Add the citations in one of the ways described in 12 and then go to Confirm tab as in point 13



The screenshot shows a page titled "CITATIONS DATA" in a grey header bar. Below the header, there is a large white rectangular area. Inside this area, there is an orange button labeled "Add Citation".