

Project 2 – Workflow and tracking system

2.1 Background

The main purposes of the workflow system in Archie are to (1) help CRGs keep track of each review through the editorial process; and (2) inform people involved in the preparation and editorial processing of reviews when they need to take action. When most of a CRG's reviews have been incorporated into the workflow system, staff at the editorial base would also be able to use the system to (3) plan and prioritize work more effectively across multiple reviews; and (4) identify and analyze trends in the CRG's processes (e.g., by identifying common 'bottlenecks' in the review process). Finally, when most CRGs are using the workflow system to track most reviews, it will be possible for the system to (5) generate reports for Collaboration-wide monitoring purposes.

The availability of an integrated workflow and tracking system was part of the original rationale and vision for the 'new' IMS approved for The Cochrane Collaboration in 2003. The workflow and tracking system is being piloted in three stages. Stage 1, which started in September 2008, was the initial pilot with only 8 groups (involving RGCs only). Stage 2 began in March 2009 and will include approximately 24 groups (involving editorial staff and editors). Stage 3 has been scheduled to start in September 2009, and will be open to all interested groups (involving editorial staff, editors, peer referees and authors).

2.2 Proposal and discussion

This project is included in this document because of the need to allocate resources for the remaining work needed to deliver the system, as it was envisaged in 2003, rather than because resources are needed for a new project.

The resources allocated to the workflow and tracking system will be used for:

- Responding to bugs identified by Stage 2 users
- Implementation of the remaining workflow templates (Feedback, Amendment/Update and possibly Request Help)
- Refinement of current functionality and, provided adequate resources, responding to prioritised requests for minor new functionality
- Development of reports for Collaboration-wide monitoring purposes
- Preparation of end-user documentation
- Preparing for the roll out to all CRGs (in keeping with Steering Group's decision that the workflow and tracking system should be mandatory)

2.3 Summary of recommendations

Resources should be allocated to allow completion of the workflow and tracking system, the third and final phase of the 'new' IMS (following the establishment of the contacts database and the implementation of RevMan 5).

2.4 Resource implications

Approximately 2 FTE weeks are needed for analysis and design, followed by 10 FTE weeks development, 4 FTE weeks of testing and technical documentation and 4 FTE weeks to prepare the end-user documentation.

2.5 Impact statement

An integrated workflow and tracking system will assist CRGs with managing their editorial process and will lead to efficiencies in the face of increasing workload and static or decreasing resources. In addition, with a sufficient amount of data stored in the system, reports can be made available for Collaboration-wide monitoring and reporting purposes.

The workflow and tracking system has the potential to improve the quality of Cochrane reviews, both by helping to standardise the editorial processes and also by helping the editorial bases to manage their limited resources effectively.