

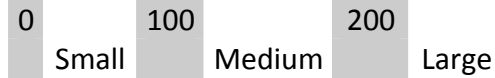
Draft Report of the Survey of Participants in Stage 3 of the Workflow Pilot Managing Editors

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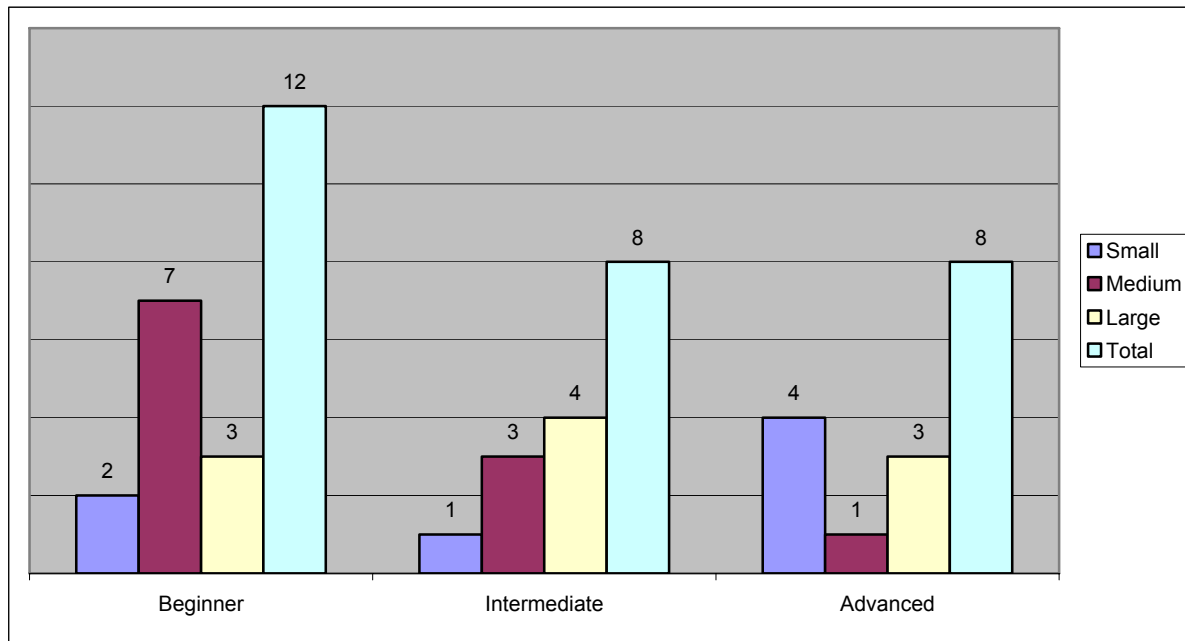
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Notes:

- 28 surveys have been taken into consideration
- 1 survey didn't answer after question # 20
- Numeric results are presented by 'size' of CRG, measured by number of reviews:



1 - How would you describe your overall level of experience with the workflow system?

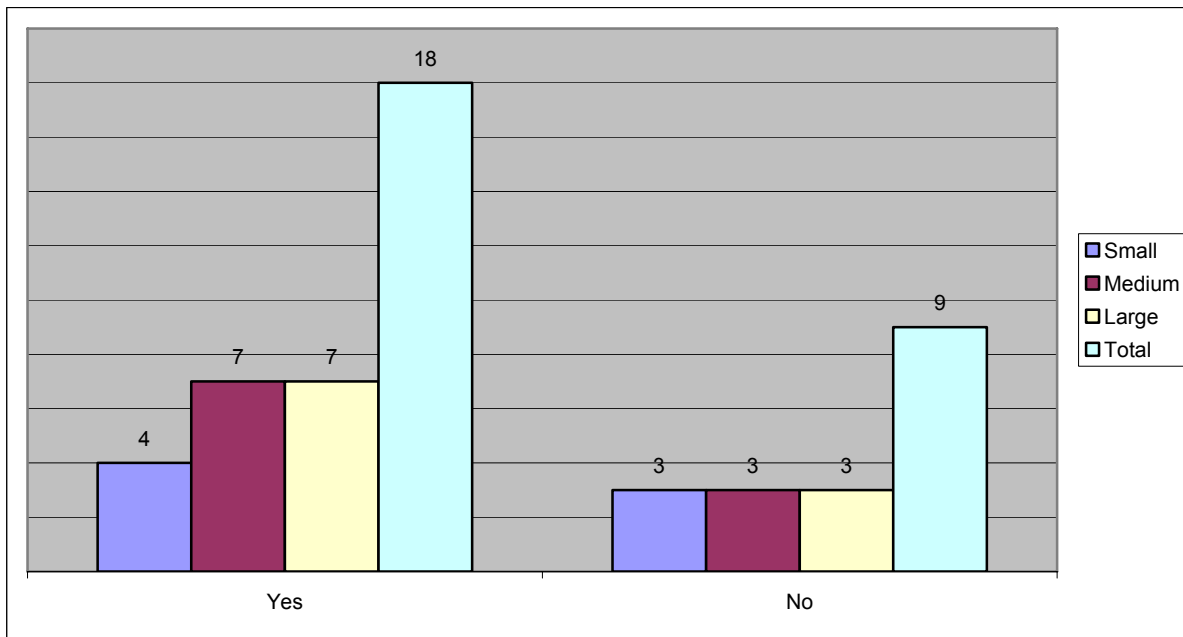


Comments:

Comment
The only area I need to spend more time on is improving my use of the generating reports function
In between intermediate and advance 'as a whole' is not true until the system is completely automated. Reports are still not

appropriate or give enough detail for reporting to funding bodies etc
I keep trying to get started, but then one of the steps doesn't fit with what I'm trying to do, so I leave it alone again ...
Started using this over the summer, but still don't feel very confident that I am using this efficiently. Initially had problems fitting our processes to the workflows and find myself cheating and skipping steps on workflow. Not sure if this is down to inflexibility of workflow system or my lack of knowledge.
I have been using workflows for around 6 months and have been setting these up as I register new titles (Protocol development workflows) and as protocols are accepted for publication (Review development workflows).
Earlier versions were cumbersome, but the latest versions are very easy to use and very useful. There was a learning curve involved but once I was familiar with the workflow system, it helped me be more efficient and better organized.
I have not made much progress with the workflow system. I find the number of processes (or steps) available daunting as it appears that our current procedures in-house don't align with a fair few of these steps.
I am still trying to get the hang of the system, I would like change the template I am using at the moment to reflect some of the issues I have come across but have not had a chance to spend some time on this
I am comfortable using the system but do feel that I am not using it to its full capacity - nor does it help me manage and monitor my work at the moment.
I feel I'm somewhere in between intermediate and advanced. It's really helped me monitor my work but not sure how it would work with TSC and Co-ed and they haven't been involved yet.
Circumstances have made our acting as a pilot for this initiative very difficult. I am therefore not as practised as I would hope in using workflows and have not yet felt comfortable enough to let go of the pre-workflow tracking system that has been developed within the Group over the years. Trying to run two systems in parallel is time-consuming and inevitably, finding time to fully engage with the workflow system has been virtually impossible. However, the desire to change our tracking system has not disappeared and I hope that I will be able to implement it in future.

2 - Have you involved anyone else in using the workflow system (TSC, Co-ordinating Editor, Referee, etc)?

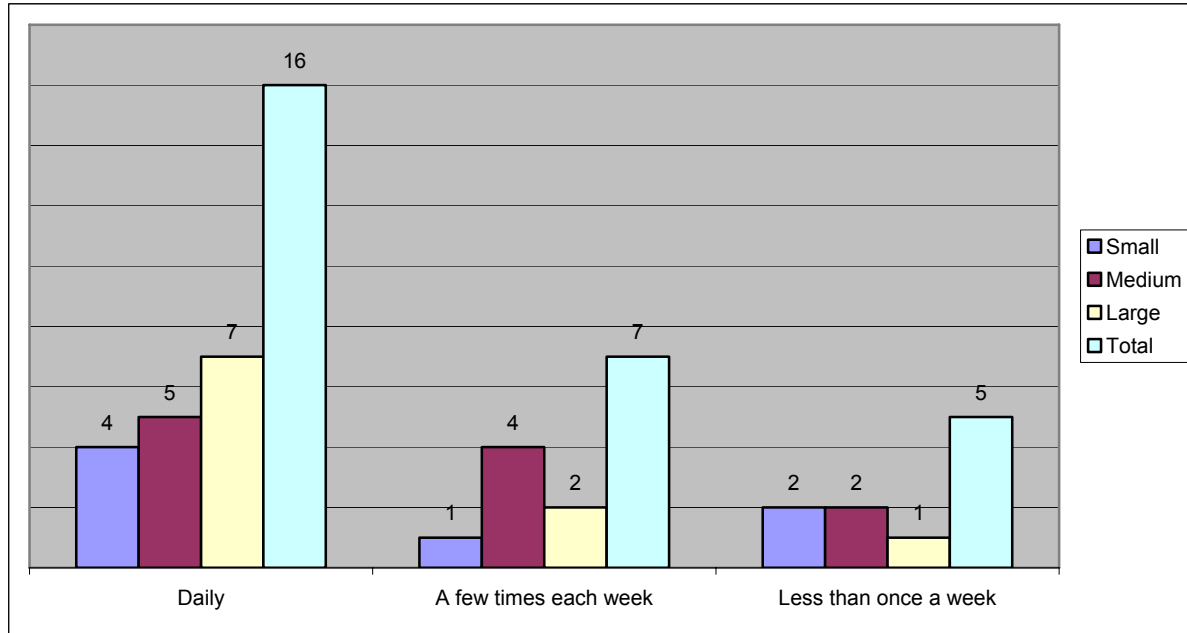


Comments:

Comment
Our TSC uses the workflow system. She was previously a super user, but now has the right amount of privileges as a TSC. I send tickets to our co-ed to give him tasks. This is working well. I have started to use tickets for peer reviewers, so waiting to see how that goes!
Editors and Assistant Managing Editor. I plan to spend time with the TSC to discuss workflows
TSC and have tried cope editors
2 AMEs, TSC uses tickets to manage her workload now, started using it recently with editors and peer reviewers.
I have included our TSC, co-ed and referees and tried to include our editorial assistant – who does the paperwork – but can't quite figure that one out yet
'Bullied' TSC and editors into using it for the reviews and protocols where we have set up workflows. Find it least problematic for referees as using ticketing system seems to work well. Editors seem least enthusiastic to using this maybe as they are used to more personal contact from Mes.
Trial Search Co-ordinator
Our TSC was previously involved, but we now have a new TSC and they are a consultant and it's not practical to continue their involvement. It would be difficult to get the involvement of our Co-Ed I think, or referees – but as I've just returned to post, perhaps our team were involving our referees?

Not yet
Working with the [parent] Group and the other [...] satellites to work together. The [...] TSC is using the system.
Only using tickets for editorial comments (editors and TSC only). My team has not come to grips with Archie as a whole, let alone workflows in particular!
Not extensively, but the TSC, Co-Ed, several authors and referees. Their feedback has been mostly positive.
Not yet. None of our referees currently use Archie.
Have attempted to involve one of our editors but stumbled at the first hurdle as the email address of the editor rejects proxy messages (as tickets are sent via cochrane and not directly from me). Again I have not had the chance to spend some time on this to sort this out.
I haven't personally but my predecessor may have done
TSC very peripherally - but has displayed no interest in getting involved
One of our MEs, also acts as our TSC.
I have at times involved one Co-ordinating Editor, one editor, our TSC and an administrative assistant.
TSC, assistant ME, students on staff.
We have involved our CoEds and other editors who make peer review comments as well as our TSC.

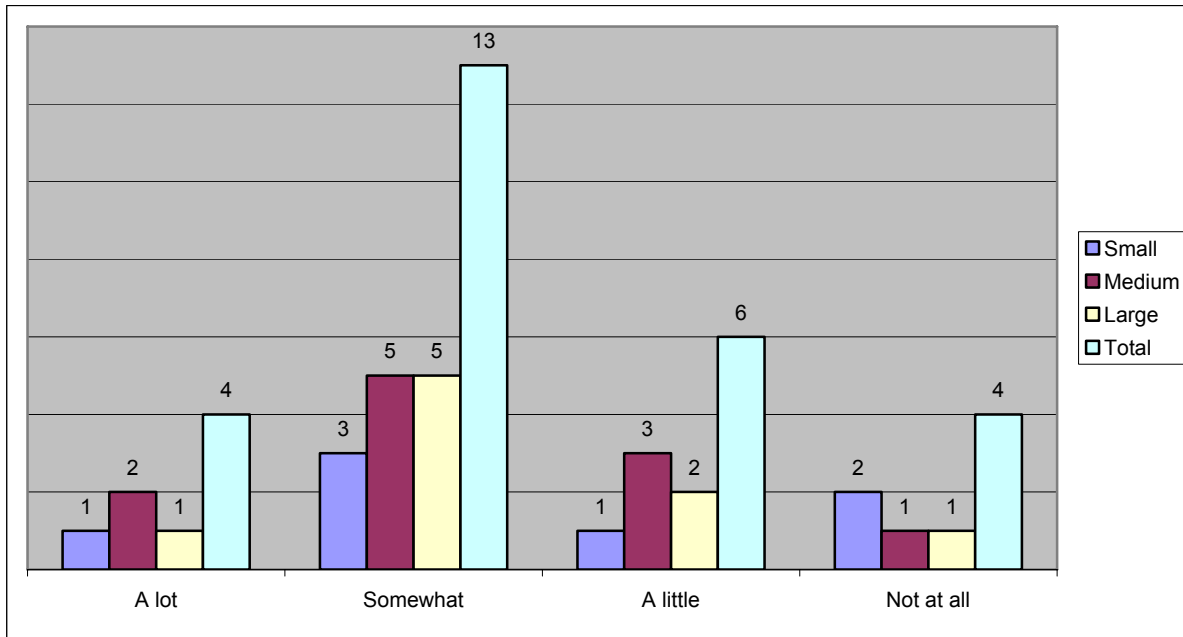
3 - How often do you interact with the workflow system in Archie?



Comments:

Comment
I find the workflows a useful place to store notes relevant to the reviews and it helps me to organise my time. We have many reviews and so often my tasks are triggered by emails from authors/editors rather than the workflows, but they are a useful way to catch up with the status of the reviews.
Trying to use it more and more often in order to become more accustomed to it.
For a while there was a problem with duplicate notifications, but since this was fixed recently, I really enjoy using the workflow system daily
I tried to use the system when I first started in the ME role. Since then, I have made poor attempts to using it but found my excel spreadsheet easier to peruse for where I was up to. I think this reflects my poor understanding of the workflow system and its potential.
Have more recently started updating the workflow for each review that I interact with rather than doing a 'mass updating session' which is less effective.
I now create workflows when a new title is registered and when a protocol/review is published. As time goes on, my interaction with them will therefore increase.
We are trying to use it as much as possible.
I'm sorry to say I've used it very little, which is entirely my fault and not because of any fault of the system.
Over the last couple of months we have been trying to use the workflow system to manage all of our reviews, protocols and titles in editorial process.

4 - Do you think that the workflow system will reduce the time you and others spend on manual entry of data in comparison to before the workflow system?



Comments:

Comment

I can't really say as I did not know a time before workflows. The strength of the workflows is that they are standardised guidance review groups and that the IMS team can provide training on how to use them and guidance as and when required. The IMS support person can look at the workflows and the systems in real time with the ME on the phone, which is great considering there is no-one else in a review group office who uses the workflows as much as the ME to help them in difficult times. This aspect certainly makes it easier when handing over to a new ME as the system used to monitor the reviews is known/common to all groups in the collaboration (or will be once workflows are rolled out).

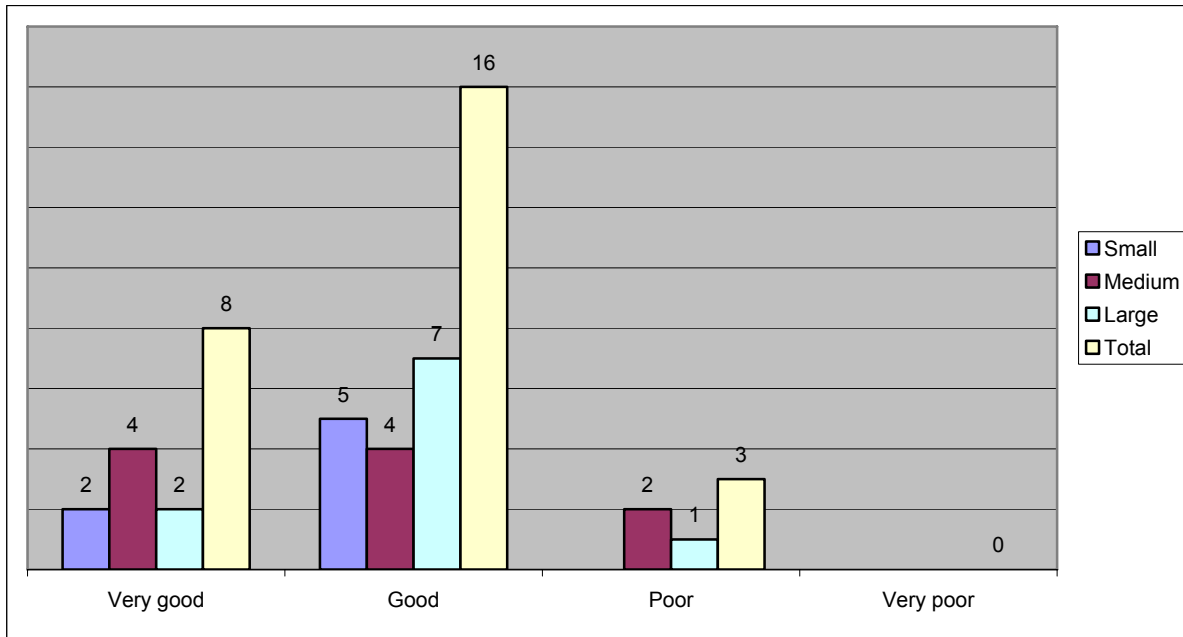
It reduces time because we don't have to maintain a separate system. Information is automatically brought into the workflows from information already held in Archie; for example, the name of the Contact Editor, Contact Person for the review, etc. Workflow reports also are compiled from data already held in Archie

My current practice is to send one email to all the peer referees at once; I keep that email and can resend it as a 'gentle reminder', removing the name of those who have already responded. With workflows, I have to do 3-4 steps for each referee, which can easily amount to 12-16 separate steps, including 2 sets of tickets/emails – one to invite, wait for them to respond, then another one to send the materials ... so it increases my work, not decreases it.

Initially hoped that once we got used to this, that there would be a big time saving. Now using the system, think my expectations

were a little high. May be that as I get used to using the system, things will change again.
I'm uncertain about this – it seems like it adds tasks and slows things down at the moment, but perhaps that's due to the way I'm taking to it.
Hard for me to answer until I have a better handle on using it on a consistent basis.
Unsure hopefully
The system is extremely detailed, which is excellent for record keeping, but it does take a lot of time to keep it up to date. I still operate mainly using my email system and then entering things into workflows and uploading files. It actually takes longer using workflows, but does provide an excellent and robust and detailed record system.
I am not sure as I am a poor user of the workflow system. To date we have an excel spreadsheet which is accessible to both TSC and ME. Since developing the spreadsheet, it takes little time to update.
Having started in March, I have no 'before workflow' comparison to make.
I do not feel I am using the workflow to its full capacity - I spent a lot of time customising the initial workflow templates to more closely reflect my editorial practice - however since these templates are updated the customisation is lost and I have not 're customised' as a result there are quite a lot of tasks which are not relevant and requires a lot of 'skipping'. I do feel that it is a 'work in progress' and with more familiarity it will save time.
We expect that our time will be reduced as our editors and other peer reviewers become familiar with workflows
The ticketing system is helpful in that we don't have to write emails for each correspondence. As well, having the peer review comments uploaded straight to Archie saves time (though it is time-consuming to have to download them to our desktop in order to attach them to the ticket for our CoEds). We would like the option to keep a copy of the text of the ticket that was sent to an author. If it is just the standard text then we would probably not need to keep it, but when we put a specific comment or request in the text of the ticket we want to be able to keep track of our correspondence. Currently, we only see that the task was completed in the history (i.e. that the ticket was sent), not the text of what we wrote to the author.

5 - How good is the workflow system at automatically notifying you and others when editorial action is required?



Comments:

Comment
I am still learning how best to manage the notifications and use them to best advantage. Part of the problem is that because I am new, not all the workflows have been set up and we are still working out how we will tackle updating and prioritising updates for the coming years. I feel confident that in about 6 months time, this will be clearer to me.
Good at notifying me as the Manager and reminding others about tasks that have been assigned to them.
Before workflows were introduced, there was no way to automatically notify editorial staff when an action was required by them.
Needs clear instructions on how to be modified - we don't use this correctly. Often end up with too many notifications especially when steps are skipped.
It is good as long as you have set everything up well, e.g. setting up the right notifications on tickets, so not purely automatic.
I see the steps when I open up Archie - the others receive tickets since they may not be in Archie daily.
I find these prompts very useful, but have had feedback from others that they "sound like they have been written by a dalek"!
This is most likely a function of me not being completely comfortable with the system as yet and not having set things up optimally
I need to streamline my templates to make this more efficient. Currently I receive notifications unnecessarily but I think this is because I need to adjust my settings.

It's good at notifying me but the notifications are not always at the same time as I have the capacity to do anything about them! So in that sense they are not always helpful.
When the workflow was appropriately set-up, this was very useful.
I assume you mean the 'tasks in progress' - I do look at this list but it is not comprehensive - it does not list all the drafts that are waiting for my attention and because we copy edit sometimes BEFORE sign off - it tells me that a review is waiting for a decision on final copy editing when in fact the review is with the sign off editor.
I don't think I have this right yet or the system is tailored for my process - not sure if it is one or the other?
I do seem to get each message twice though.
Too good! One particular challenge has been an overwhelming number of actions in my Organiser tab - creating workflows for the items in our editorial process left me immediately with over 500 tasks. I found this unmanageable.
It is helpful to have Archie automatically notify us (and reviewers) when tasks are overdue. We are pleased to note that we can use the Notifications preferences – “Documents in the [your CRG name] Group are submitted or marked for publication” option. Though it would be helpful if we could receive separate messages of both types (one when documents are submitted for editorial approval, another when documents are marked for publication).

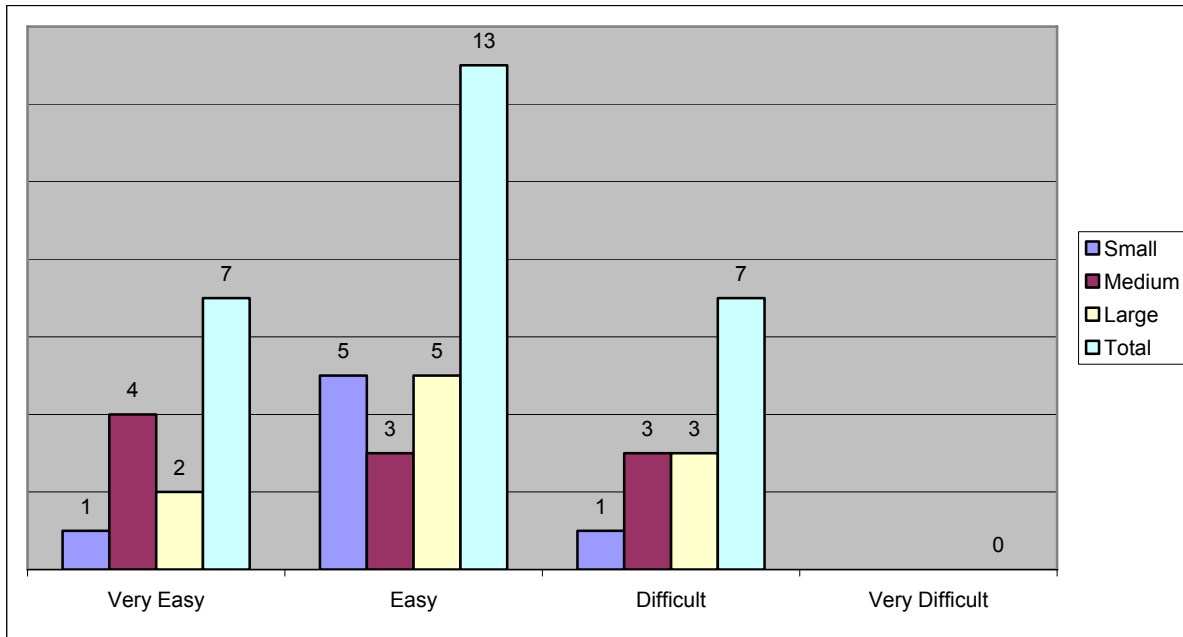
6 - Are there any types of workflow notifications you think should be added to the current system?

Answers:

Answer
No
It would be helpful if the Workflow Manager could delegate some notifications to others, such as Admin staff.
It would be helpful if workflow notifications were automatically sent to all email addresses of a user, not just the primary email address
We check in with our authors on a regular basis - this is dependent on email contact but usually starts 3 months after title registered (and after initial assistance). The only option at the moment is to set/reset the date the authors have to submit their protocol/review/update. a step that allows the CRG to contact the authors would be good. Once a workflow is complete a prompt to set up the next one would be good, particularly from title registration to protocol and protocol to review. Updates are also a problem and perhaps need a initial step to prompt CRG to contact authors telling them the update will be/is due.
It would be nice to receive notification a week or two prior to the deadline so that we could send a 'gentle reminder'
Can't think of any others

Any that we've come up with have been passed on to our IMS support person as and when they occur.
No
Can't think of any.
Can't think of any.
NA
can't think of any - but one thing we don't have is the multiple search workflow? I know that searching is incorporated into the workflow task but when a search is 6 months old we would send out another one to the authors - there is no provision for this.
Not at the moment.
None that we can think of
<ol style="list-style-type: none"> 1. Automatic reminder to authors to let them know that their review needs updating (e.g. 6 months before the current 2 year rule for updating) 2. Is there an automatic thank you that is sent once something is uploaded by a peer reviewer? Can we send a personalized message to thank the reviewer through the workflow system?

7 – How easy is it to determine the status of an individual review in the editorial process using the workflow system?

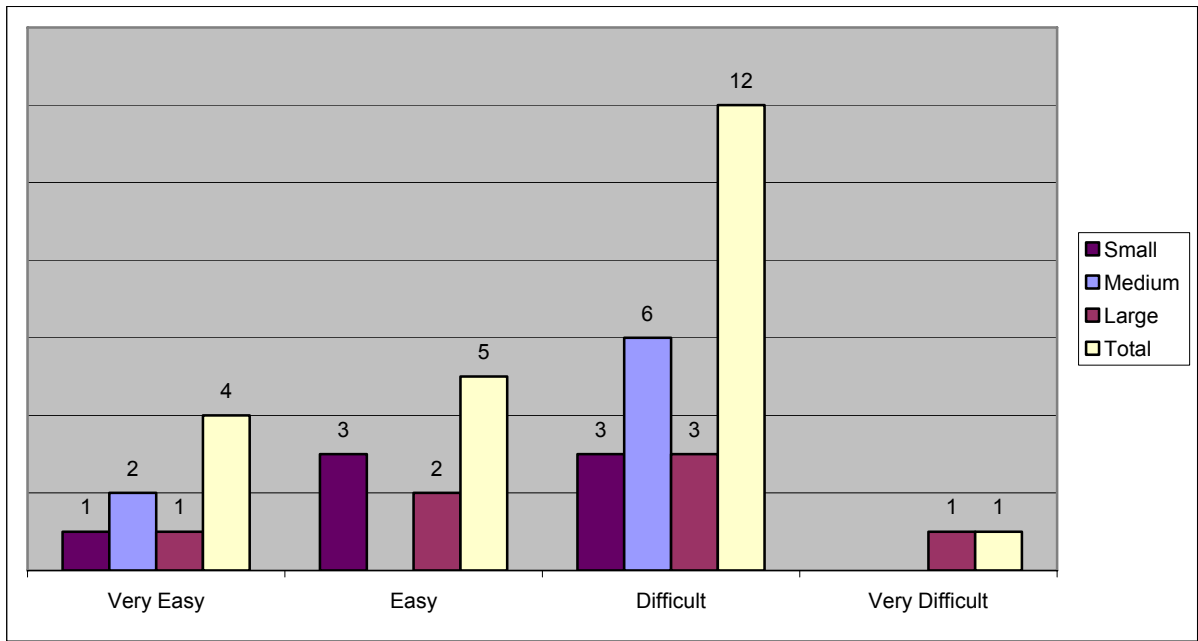


Comments:

Comment
This takes time and sometimes requires looking through emails if the workflow has not been kept up to date. This is not a fault of the workflow though!
The blue/green/red system is a really good idea but it hasn't quite stuck in my head. I would prefer the ABCDEF not to go red - the date is red and so it alerts you already. I just want to know if a stage is completed or still in progress and would probably opt for green for completed and orange (amber) for in progress.
We have system where we can see the last contact/action point. Perhaps if the last note was easily displayed so we know who has been in contact
Occasionally I still struggle where reviews take a course which cannot be accommodated in workflows, and so the workflow may stagnate whilst something else happens before getting the review back on track again. In all other instances it is easy to see what the status is.
- the notification is there - I haven't yet memorized what the A-B-C really means, so always have to open up the file
This is partly because we are still partly using our old (longhand) system and the two do not mesh well. I have also discussed with IMS the issue of having all workflows as in progress as opposed to having some not started - having all in progress just lengthens the list and does not really give clarity about which reviews are actually being worked on.

I like the colour-coding (the red 'overdue' is a real spur to action!)
It's not yet that easy, it should be clearer when one opens a workflow exactly what stage the review is at, e.g. is it out with the author, us or whatever.
I don't actually find it difficult, but I don't find it easy either - somewhere in between.
I have an ongoing problem with some aspects of the workflow not matching (and not able to match, apparently) our actual editorial process, so there are particular points where there is a constant disjunction between what the workflow says, and what actually happens. We use some 'work arounds' but can't fix this problem entirely. But apart from that it is clear where things are up to in the process.
I wasn't sure how many referees had returned the peer-referee comments and unfortunately, I did not take the time to work out how to list the peer-referees and highlight which peer-referee comments were outstanding in the workflow system.
I do this by going into the workflow for the individual review
We find that it is fairly straightforward to determine the status of an individual review.

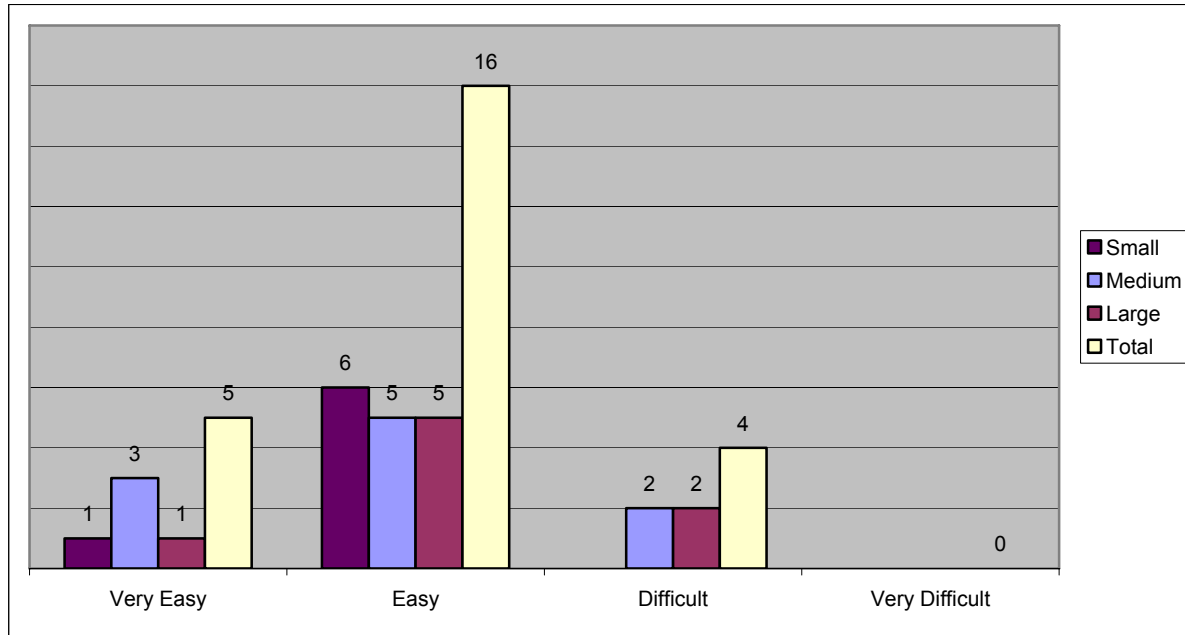
8 - How easy is it to determine the workload of individuals involved in the editorial processing of reviews?



Comments:

Comment
It doesn't depend on the task but on the quality of the protocol/review. There are huge differences between protocols/reviews!!!
Not sure. This is not something I have looked at yet since I have not set up a workflow for each review and the TSC and I are looking at how we work together and build a new system for updating and searching. This question just prompted me to look at the workflow status report which I will try and investigate and use in the near future. I can't seem to see how to look at the TSC's workload – unless it just comes from inspection of the workflow report – another thing for me to investigate!
(I think there should be a choice between 'easy' and 'difficult' on this survey) It may be that I am not sufficiently au fait with advanced searching but I don't find it very easy to map out the work so that I can make sure editors/stats people aren't overloaded at any particular time.
It would be useful to have a short PPT or video presentation to show users how they can check their individual workloads in Archie
If there is a system for this we don't use it
Running searches provides good information on this. The document roles report is also useful if you have set up roles properly. It might be useful if there was a more streamlined way of checking what is assigned to a given person rather than setting up a search each time.
Would likely be easier if I used it more.
Not tried to do this using the system yet – usually judge this by speaking with other ME and TSC face-to-face.
Again this is probably because we do not use the system to its full extent and we are not yet involving other members of staff or using the ticketing system.
I have not used the system to assess this – it is generally just me using the system. I have only sent tickets to my TSC (occasionally).
I wouldn't really know how to do this, I'm sure there are ways though.
Same as above – somewhere in between easy and difficult
I don't know how to do this but I imagine it's actually possible and easy??
As above
I do not do this or know how to do this
I would not know how to do this without consulting the Help manual. It would be very helpful for me to be able to generate a report showing a list of items that have, for example, been sent to the TSC (and the dates) - this is almost certainly already possible and again shows my lack of familiarity with the system.
At this point we are unsure how to do this.
Maybe there is a way but we haven't found out how to see the overall workload of an individual's assigned tasks. For example, we have a lot of reviews and protocols in editorial process and would like to see all that our ME has assigned to her, but haven't found a way to do this. An overall summary of each title and the task assigned (with the due date) would be very helpful.

9 - How easy is it to determine which tasks need to be completed and when?



Comments:

Comment

It might be good if on the workflow summary you could instantly see if the task was for the ME or for someone else. Then it would be less easy to overlook a task that I could have easily completed but that had dropped off my radar.

Again, would probably opt for a middle button if there was one. I find it frustrating that you can't say a task is completed until another has been done, e.g. I have one at the moment where TSC task is in progress so I can't say that comments have gone back to authors on first draft, which they have. It might be good if everything worked the way the workflows do, but I have inherited a way of working and have been told that I can't implement any changes at the moment, so I have to adapt the workflows to it and that is proving difficult.

It is quite easy to see what needs doing and in what order, but often the timeline is unrepresentative because multiple tasks may happen on a given day this accelerating the process, so it is not always accurate to look ahead at dates.

We view our workflows by manager as there are 2 MEs in the group. We can not then change the order of viewing of workflows for each of us - those not started appear first, and those in progress below. It would be easier for us if we could re-arrange this order ... or am I just being dim?

I need to work on my templates. I have found date-setting quite tricky. Timescales do not currently match our internal systems very well (my fault, not the system!)

As above - somewhere in between easy and difficult

The organiser is good for this.

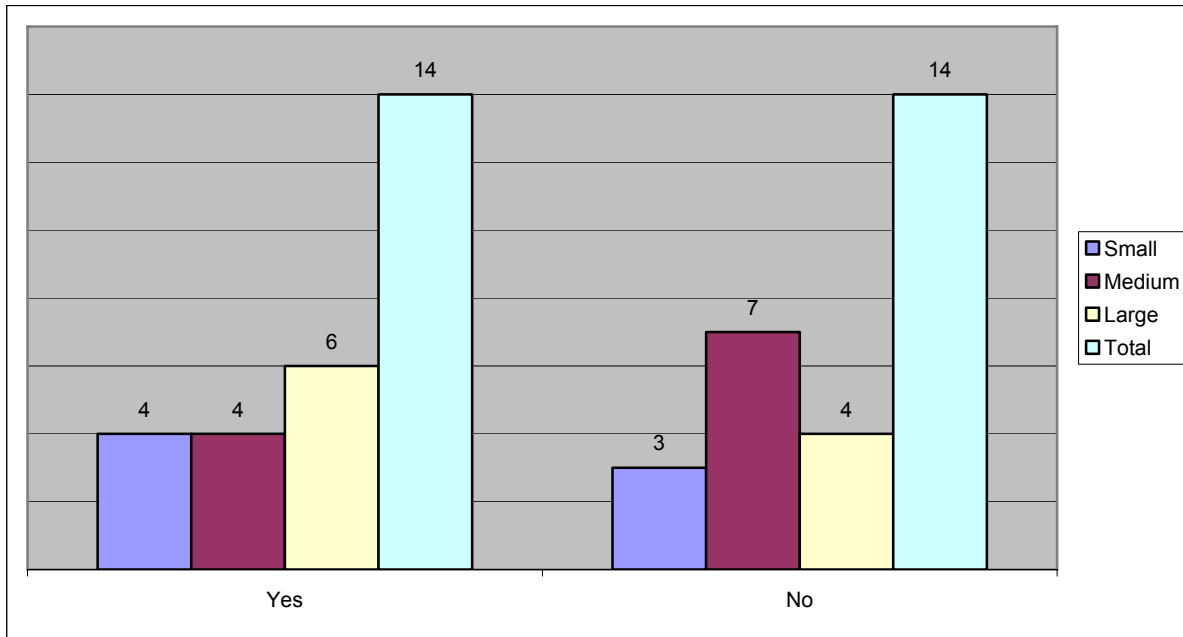
See comment above in answer to question:

How good is the workflow system at automatically notifying you and others when editorial action is required?

It would be great if the Organiser tab could be reordered so that there is more room for the 'Tasks in Progress' window - for example, swapping it with the Calendar. I am guilty of failing to scroll down the list but seeing more tasks at a glance would be helpful.

The organizer tab is useful in seeing which tasks needed to be completed with the due date. However, we would like easy access to the specific tasks from the Organizer tab so that our CoEds (and ourselves) can log in and see what they have to do and access the necessary files easily. Currently, the Organizer tab shows you what tasks you have to do, but you cannot access the files from this spot. For some roles, especially Co-Eds where we have lots of communication, sending individual tickets all the time is quite cumbersome. It would be more efficient to assign tasks to the CoEd and then have them log into Archie and be able to address all their assigned tasks directly from the Organizer tab.

10 - Have you customized the Workflows folder view?

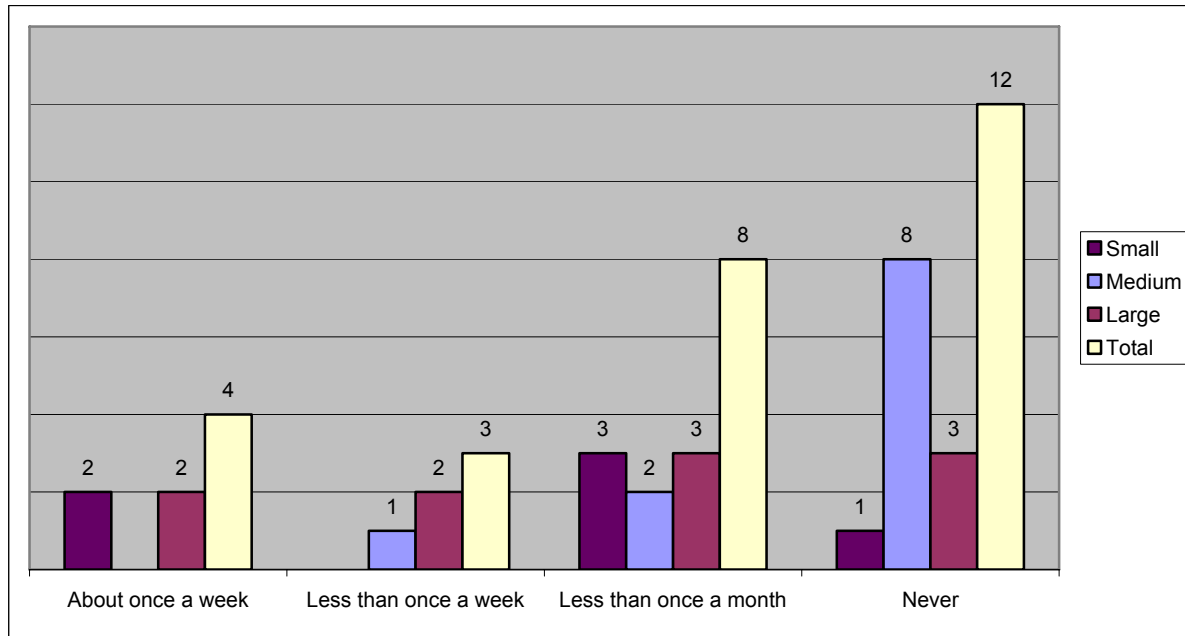


Comments:

Comment
Just did it! Most illuminating.
Didn't know it was there
See response from previous question.
We view our workflows by manager as there are 2 MEs in the group. We can not then change the order of viewing of workflows for each of us - those not started appear first, and those in progress below. It would be easier for us if we could re-arrange this order ... or am I just being dim?
Will check this out.
I did originally, but need to look at it closely and modify it again now that I have used it.
Didn't realise it was possible but have done so just now!
Yes, although I believe these need to be customised again now that I am aware of the exact procedures in-house.
This was really helpful at the start of the pilot but as new updated workflows were introduced which then needed to be re customised I have not had the time to spend doing this so at the moment am just using the default
Didn't know this existed but will have a look!!

To be honest, we haven't tried to customize the workflows. But we are a bit scared to do so as we heard from other MEs that it was a lot of work and then it had to be redone when there was an update to the system.

11 - How often do you use the Workflow Status Report?



Comments:

Comment
We are currently using this report to prioritise and plan our work/updating strategy over the coming three years. I did copy and paste this in to excel though so I could manipulate it better.
If I could get them all accurate and working, I would certainly use this report on a very regular basis.
I plan to use this report on a weekly basis to generate my workload for the week.
Didn't know it was there
This is where it actually becomes useful to have entered all the information. I like these reports and see this as a good, practical way of managing the processes

But ideally it should be accessed weekly to show the worklist for the week.
We don't have workflows for all our reviews yet, so not sure if this report would be useful. However, have discussed using this on a weekly basis in the future.
I tend to just look at the list in the Resources tab for an overview.
Since our Editorial Base meets weekly, this feature has really helped me present a clear overview of the current status of our work
Sorry never tried it – just had a go now for my protocols but did not get anything – this is clearly something I need to look at in more detail!!
I'm sure this will be a useful tool for our CRG but just don't feel comfortable with using it yet and I'm not sure what kind of reports it generates.
Not to date, but are going to investigate the ability of the system to assist with our tracking of deliverables
We are very keen to use the Workflows reports to help us manage our workload.

12 – Do you have a suggestion for how the Workflow Status Report could be improved?

Answers:

Answer
Include review code. Order by date out of date. Although I see you can actually separate out the ones that are not yet out of date – I don't think I saw that option last week...
Not showing those reviews with no tasks
To have all the types of workflow status reports we use regularly prepared with one click.
No
Perhaps could be improved further by being able to store certain parameters so you could run standard searches, e.g. reviews in editorial process.
Not really – I'm not using it frequently enough to comment
No, not yet!
Training for other stakeholders is required
No
NA
n/a as I have never used it

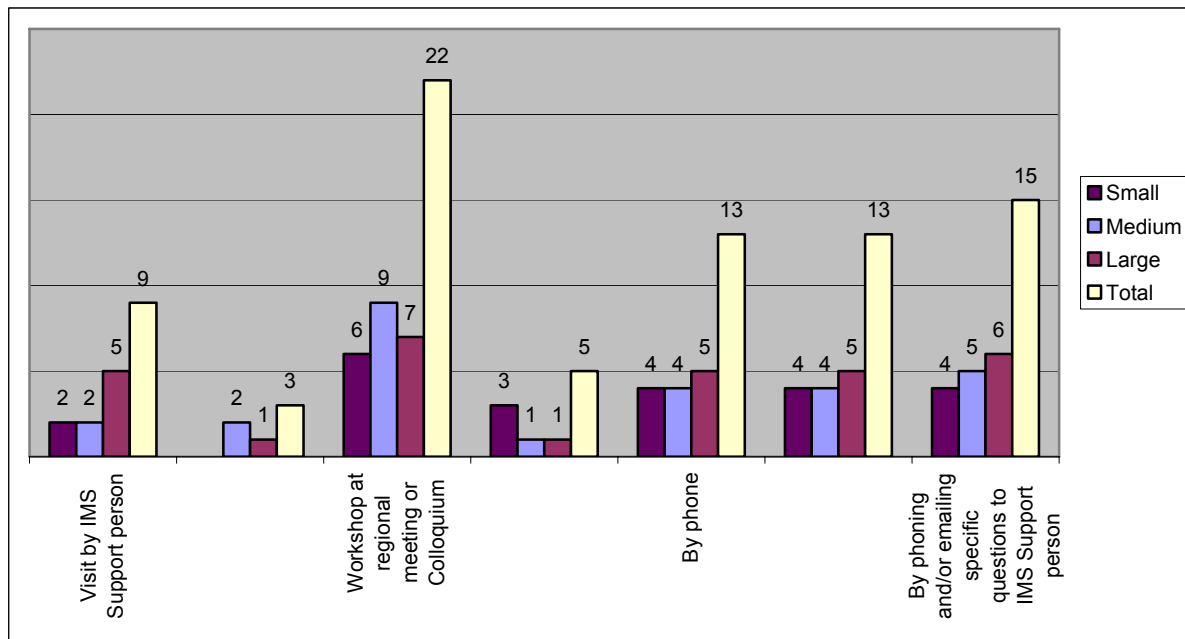
I find this quite useful actually.
However, the current Workflow status report is difficult to use. It lists each item in workflow and shows each individual task. With all we have in editorial process, it is difficult to get a quick overview of where we are. We would prefer to be able to generate one-click reports (rather than having to do searches) that show: <ul style="list-style-type: none"> i. a summary of titles, protocols, reviews in editorial process ii. all those that are overdue at any stage within the editorial process iii. more specific reports that identify overdue protocols and reviews in stages that we can specify; e.g. all those overdue that are out for external review; all those overdue that are out for internal review iv. a report for each individual involved in the editorial process - ie a list of their tasks and due dates

13 – Are there any other reports that you would like to be able to produce (e.g. instead of running an advanced search)?

Answers:

	Comment
Tagged protocols/reviews	
A report of TSC tasks? Ahhh I see that this can be done on the advanced search now... How clever, yet frightening when I make my own "in progress" report.	
All those required by monitoring reports and funders.	
No	
More reporting options relating to people would be good. E.g. if I could run a report on my statistician's involvement over the last 6 months according to workflows that would help me monitor the amount of work I was sending to them, likewise for editors. I would also like to be able to do a quick report on my TSC to be able to say what is assigned to her and in what date order it is due.	
Would like to be able to produce a report per person – unless I haven't yet figured out how to do that – which is possible	
- a summary of titles, protocols, reviews in editorial process - all titles, protocols, reviews that are overdue at any stage within the editorial process - more specific reports that identify overdue protocols and reviews in stages that I can specify; e.g. all those overdue that are out for external review; all those overdue that are out for internal review	
NA as I did not get to this stage of initiating Workflow Status Reports.	
Probably the workflow status report might do the trick – I would like to know what is currently on my desk awaiting action from me – what is out with the peer referees – what is with the authors etc etc.	
don't know at this time	
see above	

14 - What workflow training did you receive?



Comments:

Comment
The training is fantastic and very helpful!
Really useful training from [my support person] and I do call [my support person] to ask specific questions.
Not applicable
Self-help and IMS Development team support
Initial visit and documents but nothing else - needs to be more structured and ongoing
It isn't that I haven't received enough training - and [my support person] is superlative -- I just need the day to sit down and figure it out -- and I haven't found it yet!
Support is good, I think it is a question of using the system more and trying things out myself.
I have been offered IMS Support person training, but I have not yet had time to do this.
The workshops for this have not been super helpful the last few times. I feel I could have been using them more than I have been, but have been left feeling a bit bewildered with them. I wonder if it would be worthwhile having another sessions like the January session we had for

RevMan 5 that was held a couple of years ago?

An introduction to workflows occurred at the same time as being trained on Archie and RevMan 5. As this time with the IMS Support person was compacted, I admit that I did not retain all of the relevant information.

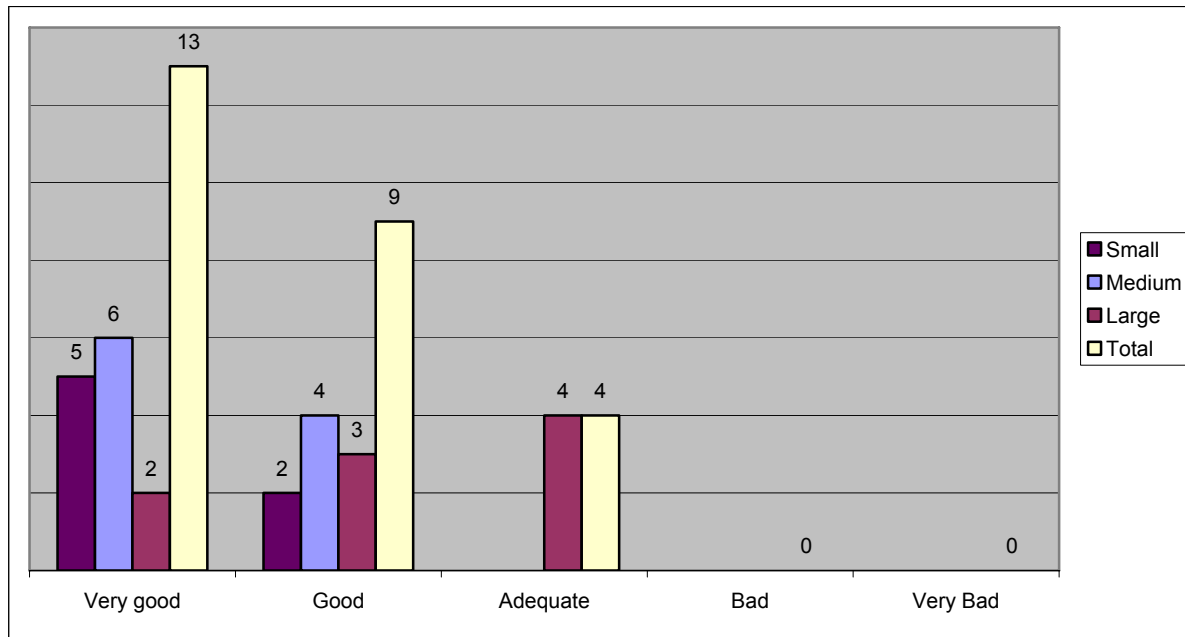
I think I would really like a follow up face to face session - either here at the Ed base or happy to travel to another location - but would like to go through the way I am using the workflow and get some feel of whether or not this could be improved.

These have all been very useful, and I have learned most by hands-on experience.

[my support person] has been very helpful.

[my support person] is very helpful and responsive to our questions.

15 - How would you rate the level of workflow training you received?



Comments:

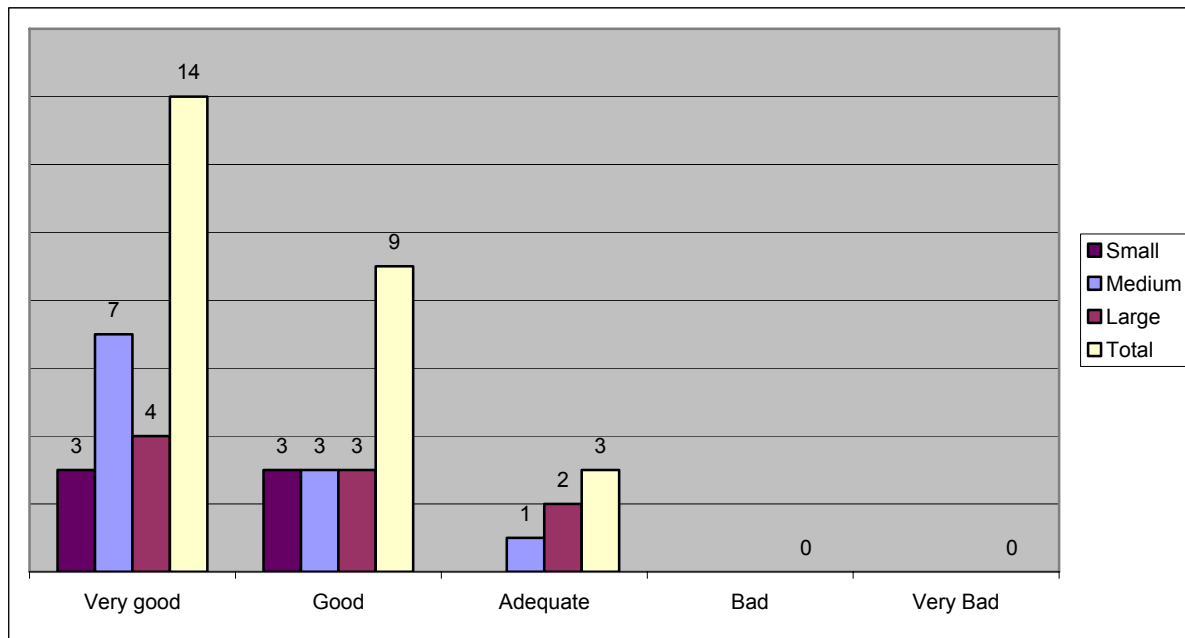
Comment

To be honest I can't think how this can really be improved. I think it would be tedious to have each and every thing explained to you click by click and you wouldn't remember it anyway.

I thought it was very good but would just have liked more but being able to telephone for advice probably makes that unnecessary.

Not applicable
:)
Adequate in that I can use the system
[my support person] is always fantastic and so supportive and clear.
Because of events within review group and timing of commencement of contract, workflow training very sparse
See comment above.
Workflow training at Colloquia and UK meetings have always seemed to be fraught with technical problems and were not as useful as they could have been.
The level of training (and being able to use the system in workshops) is excellent.
The training was good, but we found it difficult to find the time and resources to get all of our reviews and protocols into the workflow system. So we didn't always have the chance to put into practice what we had received in training sessions.

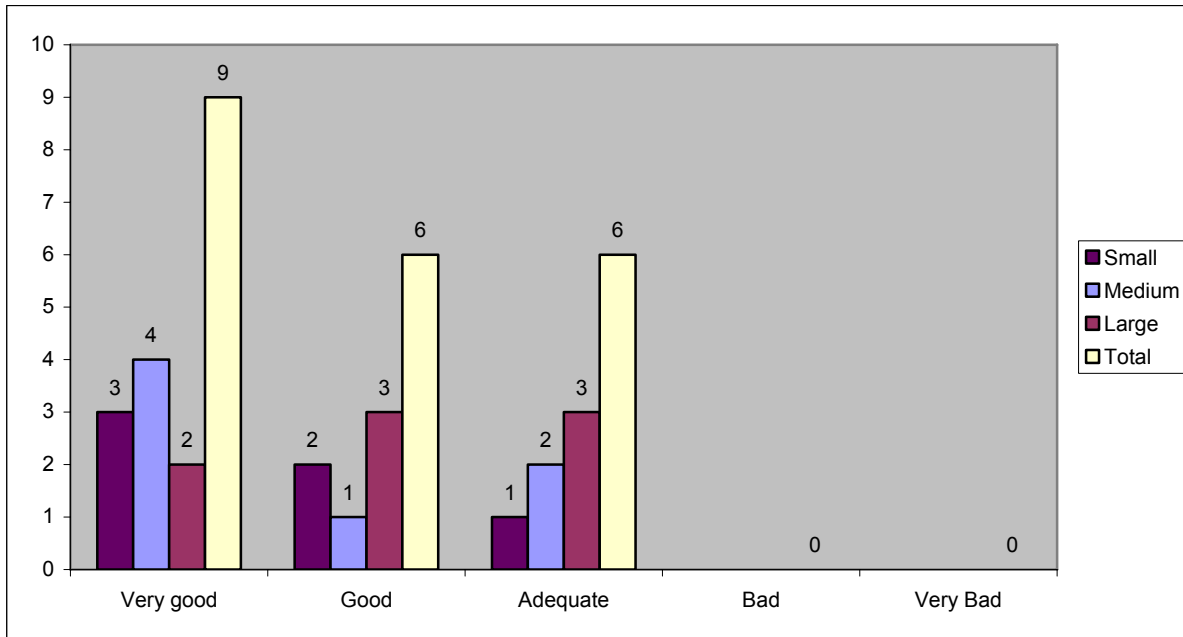
16 - How would you rate the ongoing workflow support you received?



Comments:

Comment
The answers are out there, just have to keep asking questions and trying to do things with the advance search and the workflow reports and learning handy nuggets of information along the way. I don't think I put my name down for workflow training at the colloquium as I was not sure what level it would be at.
[my support person] being so available is great
Not applicable
Comment on support from IMS Development Team
Training is really up to the user and it requires the user to contact the trainer. I don't think this is the best system
It would have been better if I would have used it more
Haven't needed much. [my support person] is very responsive when problems arise.
NA; as I did not actively use the system often.
Queries always answered very promptly and satisfactorily.
[my support person] is incredibly patient!
[my support person] is very responsive and follow up on all of our questions if she is unable to answer it at the time.

17 - How would you rate the responses to workflow feedback (bugs reports and wishes) you received?



Comments:

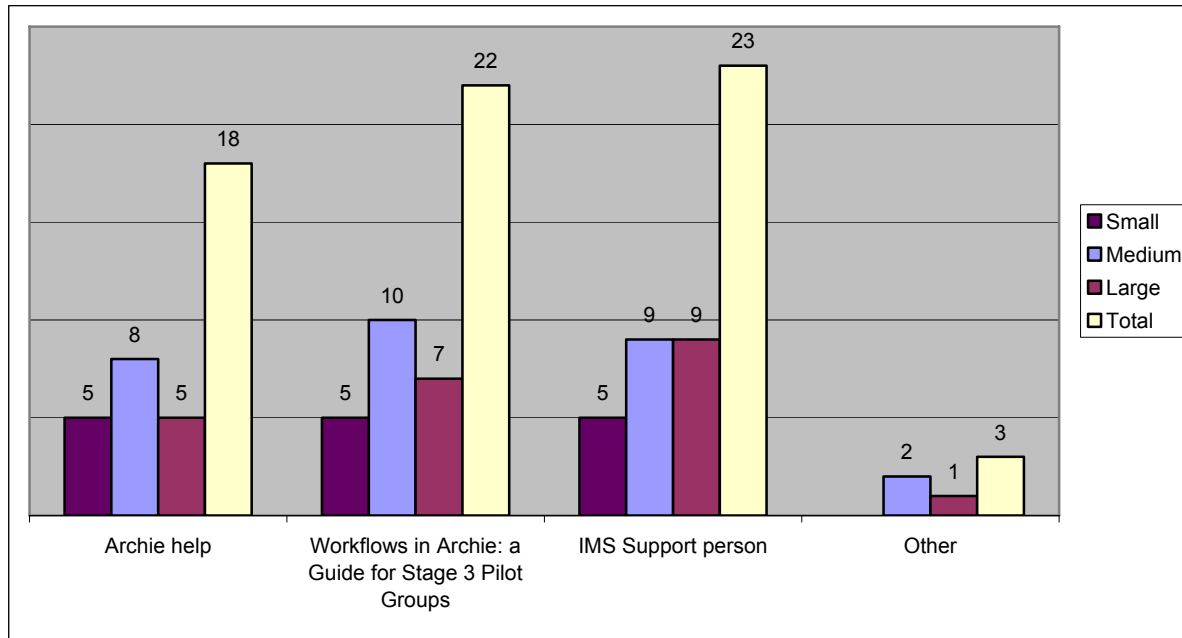
Comment
I have left my suggestions with [my support person] and reported a few. I have left the IMS team to get on with the ones that they consider a priority.
I know that I could have tracked what happened to my suggestions but I didn't
Usually receive feedback the following day on workflow bug reports
Not submitted feedback yet.
I haven't given any workflow feedback as yet.
A bit frustrating that my major gripe doesn't seem to be able to be addressed!
I do not believe that I received workflow feedback.
I did not submit feedback so cannot comment on this
Prompt and helpful responses
I think at one of the meetings I requested that a Gantt chart might prove useful to visualise the timeline of milestones over all the projects (reviews). I was thinking something along the lines of the way Microsoft projects and suchlike programs work. I don't really find the one we have that useful and don't really use it. I'm not sure that it looks useful the way it is now. I'm not sure if this is the

right section to put this comment in.

We have submitted only a couple of items to the wish list but the response was fast and helpful.

Only submitted one feedback, no response yet.

18 - Which source(s) of support have you used?



Other source of support:

Source of support

Mostly the workflows are self-explaining.
test server to test permissions (what TSC/author/staff and so on can see)

Other MEs

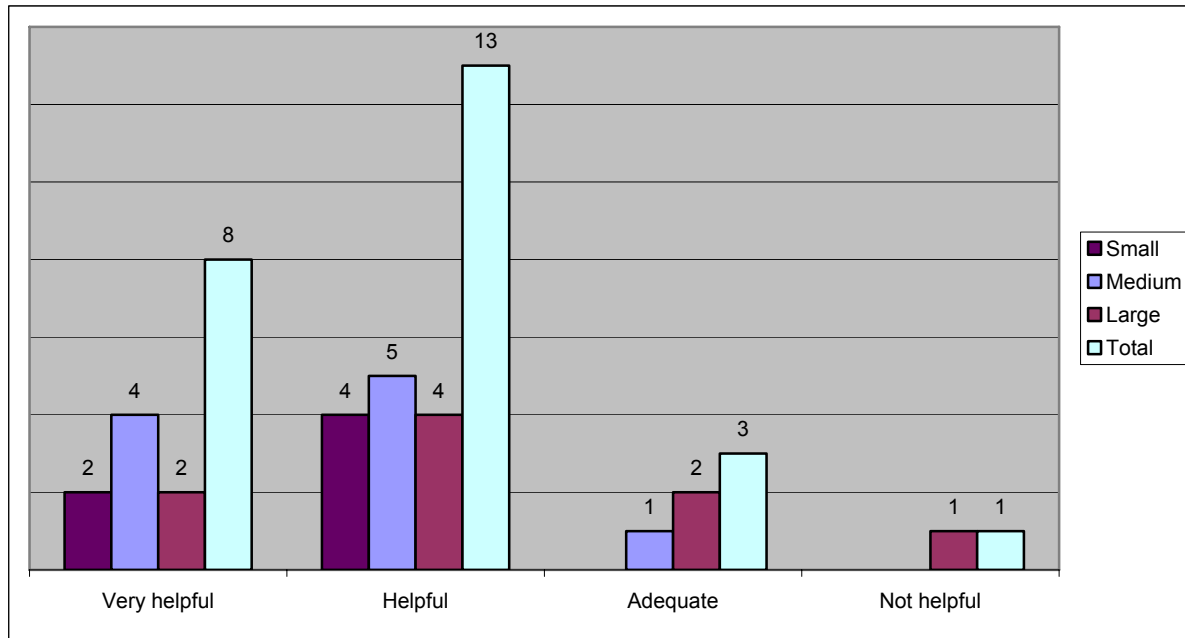
Not applicable

IMS Development Team

NA

Colleagues, ME for other groups

19 - Has the document 'Workflows in Archie: a Guide for Stage 3 Pilot Groups' been helpful?



Comments:

Comment
I didn't use it very often
I should probably read this again!
Have not had time to read it properly
Well written and illustrated
I have only said adequate as I haven't used it so far...
I did not have this document on-hand so cannot comment.

20 - To what extent do the following templates match your editorial processes (taking into account the current ability to customize templates for use in your CRG)?

Q20	A LOT					SOMEWHAT					A LITTLE					NOT AT ALL					Total	[no answer]		
	Small	Medium	Large	Total	%	Small	Medium	Large	Total	%	Small	Medium	Large	Total	%	Small	Medium	Large	Total	%		Total	Small	Medium
Title Registration	4	1	2	7	28	2	3	5	10	40		1	2	3	12	1	3	1	5	20	25		3	
Protocol Development	3	1	2	6	22	4	9	8	21	78				0	0				0	0	27		1	
Protocol Amendment		1	1	2	10	4	5	6	15	75				0	0	1	2		3	15	20	2	3	3
Review Development	3	1	2	6	22	4	9	8	21	78				0	0				0	0	27		1	
Review Amendment			1	1	6	4	4	6	14	78				0	0	1	2		3	17	18	2	5	3
Review Update	2		2	4	17	3	8	8	19	79				0	0	1			1	4	24	1	3	

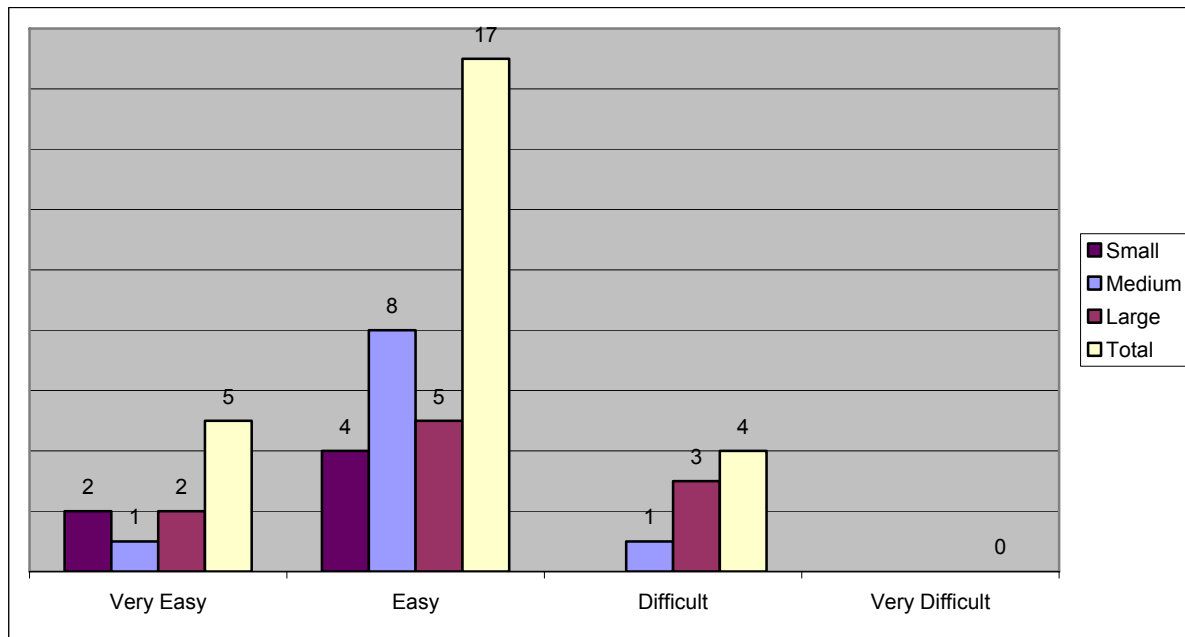
Comments:

Comment
We need a loop for the case: a protocol/review doesn't reflect the comments. There are only 3 days for MEs to check wheter a protocol/review reflects the comments, but very often the authors had to rewrite the whole document. In this case we (CRG advisors, not the ME) will have new comments, different from the first comments
Protocol amendment/review amendment: not applicable, we didn't have had amendments in the pilot phase
I haven't done any amendments since being managing editor.
I don't think 'customize' accurately describes what we are able to do. We can't reorder tasks, for example, (to my knowledge).

<p>We don't use the Title Registration Workflow from the beginning, ie when we receive an enquiry. We have only started to use the Title Registration Workflow this year and start it at the point when we receive a fully completed Title Registration Form. The reason is because we do not have the resources/time to log in Archie all the enquirers we receive. It is too time consuming and given that many people don't return a completed form, we don't think it is a good use of time to create records in Archie for people who may never contribute to our work. We also don't have the resources to remove such records.</p>
<p>I do not deal with title registration so I have not edited that template</p>
<p>We follow the process, its just that we condense some of the steps into one (see my earlier comments) and the internal/external review isn't always as clear cut as the workflow demands.</p>
<p>We sometimes find that we combine some of the individual steps in the workflow e.g. ask ref to comment, ref to agree, make docs available. We do this in one email, so find myself skipping tasks and then going back if the ref can't comment. Also, for the update workflow, we would normally start by the TSC running the search and then the ME would contact the authors, but in the workflow, we have to skip the task of contacting authors so that the TSC is prompted to run the search and the ME needs to quickly email the authors before they get a reminder that their task to update the review is due. Would be good if we could change order of some steps.</p>
<p>I have only used the Protocol development and Review development workflow templates.</p>
<p>As mentioned earlier, I have a major problem with the Protocol and REview Development templates in particular, which sequence internal and external comments (going back to the authors in between them) rather than conducting them at the same time (as we do).</p>
<p>The workflow was initially used for protocols and reviews only.</p>
<p>I have not checked protocol amendment or review amendment because I have neither looked at them nor used them. I don't use the Title registration template because my process doesn't really fit - a lot of the tasks involved are AFTER the decision to register the title.</p>
<p>Not really sure what the protocol amendment and review amendment templates are for.</p>
<p>The ability to customise templates is essential. However:</p> <ol style="list-style-type: none"> 1. The templates are currently based on the 'Contact Editor' system - we do not use this system and it is difficult to adapt what we do (of three editors and one content expert) into this. The roles in the workflows do not seem to match the roles in Archie (i.e. CRG Advisors instead of Editors) - it would be helpful if they did or if the templates could be adapted more significantly. 2. We rarely have a protocol or review that follows the editorial process perfectly and I find it very difficult to customise an individual workflow to reflect what has happened i.e being returned to authors several times.
<p>Have not used "non checked"</p>
<ol style="list-style-type: none"> 1. The title registration workflow does not allow a revised title registration form to be sent back to our editors for a second review and to see the author's responses to comments; we can only send to one editor; the rest cannot make further comments and upload them.

2. When rejecting a title, we cannot send a ticket to the authors to inform them; instead we have to do so in an email. We wish to keep all correspondence within a workflow and not have to revert to using emails, which then have to be copied into the notes section to keep track of correspondence.

21 - How easy is it to use the workflow system?

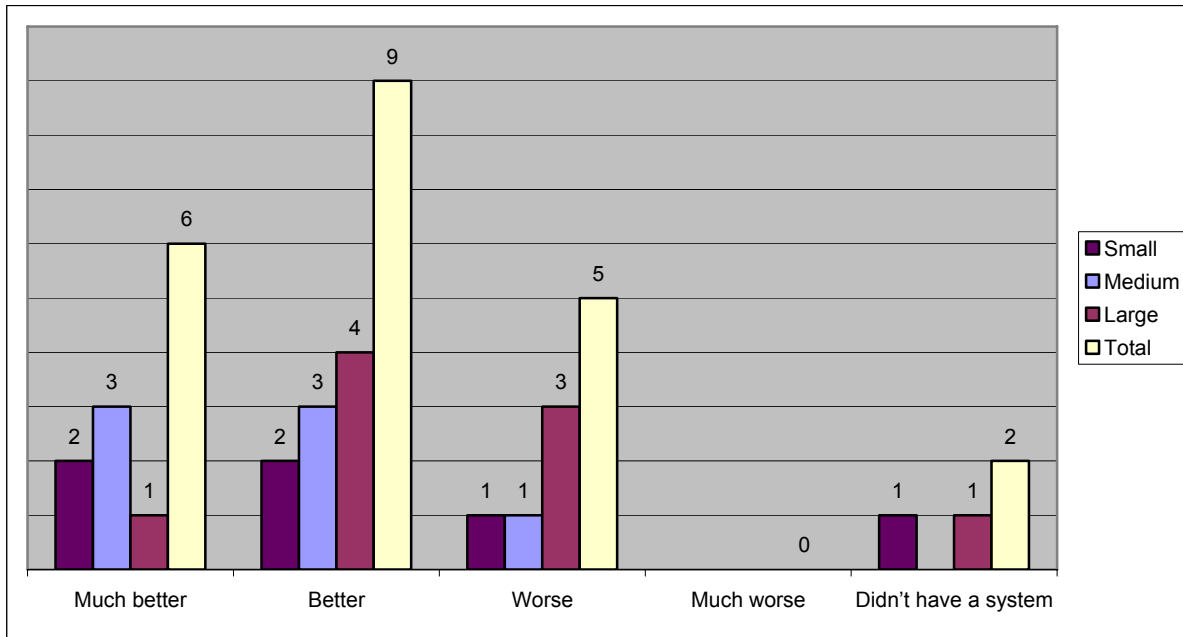


Comments:

Comment
I think that is it relatively easy to begin using the workflows. However, I am not sure that I have been using them to thier full potential, but will continue trying.
In theory, I think it is great. In practice, it is not possible to completely rely on it. Although I started off doing that, I have started developing my own spreadsheets.
I would say very easy from my perspective, but others have struggled to get to grips with it, and that has been a problem for me as ME, as I am constantly trying to explain it to them.
With the exception of the comments already made about the cumbersomeness of the workflow, it is fine - I'm sure if I could figure out the short-cuts, it would be much better

I have selected easy, but really I think that overall it is slightly difficult. Choosing difficult here would be too strong, as once the workflows have been set up the system is quite easy. However, adapting the templates to work processes and vice versa is not always easy.
I am finding date-setting difficult but acknowledge that I need to take some time to work more carefully through my templates.
It still feels very clunky and like additional work, not like something that's going to make my job easier.
I find it has a lot of steps involved.
Not easy exactly but reasonable!
Probably easy if at the time of using the workflow system, I understood the in-house procedures (as I am a relatively new ME).
I find it difficult to comment as I'm still learning
The system is easy to use - but I do not feel I am using it properly or to full capacity.
Would find it useful to see how other CRGs use the system - this may be a good way of picking up tips and ideas.
The workflow system itself is, I am sure, easy to use once if time is invested in becoming familiar with it. However, CRGs face pressures from all directions and a significant lack of capacity means that implementing any change in process, particularly from one well-established over years, is surprisingly difficult, even when the desire is there.
Customizing the system may increase ease of use, but to date, we have not customized.
We do appreciate the efforts to provide a streamlined process to track and help us manage the editorial process. However, we still find the Workflows system rather clunky and it can be time consuming. Simple things like being able to access the details (ie the review and reviewer comments) straight from the Organizer tab would save time. So would being able to upload attachments to tickets directly from the Workflow Files tab (where we have reviewer comments stored). We have briefly seen a manuscript management system such as Scholar One and it seemed like the tasks were much more automated. Also, we want to have all our correspondence with authors in one system so that we don't have to look for correspondence in our email (and copying and pasting from our email to Workflows is time-consuming). It would be really helpful to have the ability to correspond with our authors from within workflows; ie to get a status check on their review, or to answer a methodological question.

22 - Overall, to what extent is the existing version of the workflow system better or worse than the system you used before to manage your workflow/track your work?



Comments:

Comment
I've been in post only 3 months!
Can't comment as I have just started.
As an example, automatic reminders to Editors to complete a task is a very helpful function of the workflow system. This was not available before and reduces the time Mes spend reminding Editors to complete their work.
All staff don't sue the system as yet and so difficult for overall management. Often only the ME knows what is due when.
It is good, but I am sure it can be better.
For the reasons already outlined. I had asked at the beginning if we could individualize by adding steps or changing them, but was advised that we could only delete/skip steps. However, unless I'm missing something (& I could be), I have to go through all the steps in assigning roles – for if I don't indicate they have 'accepted' then I can't figure out how to issue a ticket... 20 minutes versus 5 => not a big time-saver I'm afraid.
Better in some ways, worse in others (could be down to inexperience) so ever the optimist I hope that once I am using this more often the answer will be 'better'!
This is perhaps not the right response here but there wasn't a more appropriate option for me. Our in house system was developed

over years and so matched our needs perfectly. We will need to spend a significant amount of time working with workflows and adapting as appropriate before we get the same level of comfort and convenience
I have selected better because it is certainly not worse. However, I managed very well with my existing fairly slim-line system, which I am continuing to maintain in parallel. I can appreciate that the workflow system is of huge benefit to larger groups and also that it may help in external monitoring of workflow across the CRGs. I am happy to use it.
It's not quite worse, but I'm still more comfortable using my current system.
I find it has almost has too much detail, but having said that my previous method was pretty basic. If used on as consistent basis and if I modify the templates to suite me, I may find it to be more useful.
More time consuming, less intuitive, but a much more detailed and robust system than my previous ones.
I was using an Access database before, the current workflow system is much better, especially due to its integration with Archie and RevMan but also due to it's ticketing system and the automatic reminders
I think the system will work better once I get the hang of the system properly but at this moment in time I would say the system works no better or worse than the current system I use
I came int our group when the pilot was already underway, so have no comparison
I find this question hard to answer because I want there to be a 'same' option. I do not rely on the workflows to keep a check of what I have on my 'to do' list with protocols, reviews and updates - I still have other systems which the workflows have not yet replaced. There are also resource reasons for this as I am really the only person who updates the workflow.
The workflow system has the potential to be better than our existing system - the idea that all information will be stored in one place and that reminders are generated automatically could improve our workflow. However, this necessitates a pretty big change in thinking and practice for MEs who have been in post for some time - I don't think this should not be underestimated.
It is an improvement to have an electronic system, but we feel its functionality and ease of use needs to be improved.

23 - If you had to choose a single thing for a future improvement of the workflow system, what would this be?

Answers:

Answer
Loops for the tasks: does the revised protocol/review reflects the comments?
Having a TSC role in the protocol development workflow to ask her to contact the author team to discuss search strategy. We have looked silly as I told all our new authors that [our TSC] would contact them, but that message was not communicated to [our TSC]!
Ability to change the template mid-way, swap tasks and people they are assigned to around and say 'complete' to a 'not started' task.
Can I have 2!? One click reports and more automation.
I would ask that review numbers are added to the review title in the Messages system when reviews are checking into Archie for

editorial approval. This would help me to easily identify which review was checked in if I could see the number.
Incorporate reminders for CRGs into system
The ability to change the file names of files uploaded into workflows without re-uploading them. We have our naming system for files but then peer reviewers change the name and so it is wrong. re-uploading then loses the information about time, date and person who uploaded the file, so that is useless.
Allow me to add/re-order some of the steps
Being able to re-order steps in the template.
Make it more user-friendly - make the interface more accessible - quicker access to the workflows at a glance perhaps?
Needs to be less time-consuming if possible.
More flexibility in the role names.
Continuing greater flexibility and intuitiveness.
The addition of some sort of automatic priority classification for each revision that is submitted to the editorial process
Possibility to allow for several cycles of peer-review.
The ability to change the sequence to fit the editorial process and to add steps appropriate to my editorial process - e.g. to put in a check if a new search is needed before publication or some such step.
That you could amend each workflow if needed, without having to alter the template, as there maybe some issues pertaining to particular reviews.
It would help if a ME was able to add tasks which are unique to their CRG to the templates. Also if we could change the order of the tasks, for example our sign-off editor signs the review/protocol off after copyediting, not before as it appears in the templates.
The ability to customise templates even further, to reflect the different working practices of each CRG.
None at this point come to mind
For Archie workflows to have the functionality to manage the entire editorial process. Currently we have to go between emails and Archie and it is time consuming and frustrating when correspondence and tasks are in different systems

24 – Any other comments you wish for us and/or the Steering Group to consider?

Answers:

Answer
Being able to add tasks into the workflow template, or drag and drop the tasks in a specific workflow to adapt to a unique editorial process necessary for a particular review
Decide if the chief aim of this innovation is efficiency or standardisation? If the former, more possibility of local customisation is required; if the latter, it is a much bigger task that needs a culture shift so change management expertise would be good and getting Co-Eds on board.

To continue to build on the achievements of the system to date.
If the SG does not decide to make workflows mandatory for all CRGs, or to continue supporting workflows, I would like to know their recommendations and reasoning for an alternative system that offers the same level of support as workflows offer us now.
I do appreciate all the time, energy and resources that have gone into this and I rea[my support person]e that for some of the busier groups, it is vital. I wish I could adapt it to meet my needs, because I'm sure it would help me save some time too – maybe I need to find some time to spend on it – again – but the wind was a little knocked out of my sails when I spent 2 days to individua[my support person]e the templates, only to discover that only a few weeks later, there were some major changes – so I didn't both to individua[my support person]e them again – until the pilot was done.
I am very grateful that time and energy was invested in developing the workflow system, it is absolutely worthwhile
I have tried to answer this survey frankly otherwise the feedback you get has no value. I have some individual queries as follows: 1. Protocol - how does the workflow alert me when a protocol is overdue for submission? The task of completing the protocol belongs to the author not me at the editorial base? 2. when a revised protocol is submitted I would like to send this to the TSC for checking the search references etc before sending this to the sign off editor - can i add this step? 3. review updates - determine what kind of update - if it is an update with a new search but no new trials how do I skip through to the task - send comments to contact editor (steps 10 to 15). If it does not need copy editing I still have to progress through ALL the copy edit stages 31 to 40? I think this was 2 questions! Overall I think the IMS team provide a splendid service and are very supportive. I think workflows have great potential but feel I have not quite got there. I think it is very important for this support to remain in place.
This is a really helpful tool and it has helped me monitor my workload much better than before. I would highly recommend that the Steering Group makes it mandatory for all CRGs.
This seems to be a good system and should greatly improve our ability to efficiently work through the process of publishing protocols, reviews and updates.
We have put together this wish list and hope you find it helpful. WORKFLOW WISH LIST ([...]) We are excited to have a system in which to track all of our reviews through the editorial process. In using the system more over the last few months we have identified areas for improvement which we feel would help us manage the process more efficiently and easily. We have discussed most of these with [...], our IMS support person. 1. We store files in the Workflow Files tab (e.g. title registration form, peer reviewer comments); but when we want to send a ticket and attach one of these files, we cannot do so directly from Workflows in Archie. We need to download the files to our computer and then upload them to the ticket. It would be much less time consuming if we could send the files directly from the workflow. 2. The title registration workflow does not allow a revised title registration form to be sent back to our editors for a second review and

to see the author's responses to comments; we can only send to one editor; the rest cannot make further comments and upload them.

3. When rejecting a title, we cannot send a ticket to the authors to inform them; instead we have to do so in an email. We wish to keep all correspondence within a workflow and not have to revert to using emails, which then have to be copied into the notes section to keep track of correspondence.

4. We would like the option to keep a copy of the text of the ticket that was sent to an author. If it is just the standard text then we would probably not need to keep it, but when we put a specific comment or request in the text of the ticket we want to be able to keep track of our correspondence. Currently, we only see that the task was completed in the history (i.e. that the ticket was sent), not the text of what we wrote to the author.

5. We would like easy access to the specific tasks from the Organizer tab so that our CoEds (and ourselves) can log in and see what they have to do and access the necessary files easily. Currently, the Organizer tab shows you what tasks you have to do, but you cannot access the files from this spot. For some roles, especially Co-Eds where we have lots of communication, sending individual tickets all the time is quite cumbersome. It would be more efficient to assign tasks to the CoEd and then have them log into Archie and be able to address all their assigned tasks directly from the Organizer tab.

6. Reporting: we are very keen to use the Workflows reports to help us manage our workload. However, the current Workflow status report is difficult to use. It lists each item in workflow and shows each individual task. With all we have in editorial process, it is difficult to get a quick overview of where we are. We would prefer to be able to generate one-click reports (rather than having to do searches) that show:

- i. a summary of titles, protocols, reviews in editorial process
- ii. all those that are overdue at any stage within the editorial process
- iii. more specific reports that identify overdue protocols and reviews in stages that we can specify; e.g. all those overdue that are out for external review; all those overdue that are out for internal review

Other RevMan/Archie issues:

7. We would like to have Archie/Workflows automatically assign a unique ID and revision number for each title, protocol and review. Currently we have to keep a separate Excel spreadsheet to record the Review Numbers which we then transfer into the Review Number field in Archie. It is helpful that this field is now displayed on the front page of the review, but it is still cumbersome for us to have to manually keep track of these numbers. Having Archie automatically assign a number at the title registration phase would be most helpful.

8. We would like to have an automatic priority classification for each revision that is submitted to the editorial process, as [our co-ed] has described to us in the Elsevier system.

10. In Overview reviews you currently cannot upload SoF tables into the RevMan overview file and they have to be manually created in Additional Tables. It would be most helpful if we could upload SoF tables we have created using GRADEPro, into the RevMan overview file.