

Draft report of the Survey of Participants in Stage 3 of the Workflow Pilot

Non-MEs users

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Notes:

- 29 surveys have been taken in consideration
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1 - Please select your role in your CRG

Answer (MC)	#
Assistant Managing Editor	2
Trials Search Co-ordinator	6
Co-ordinating Editor	3
Editor	11
Copy Editor	1
Contact Person of a review	9
Referee	6
Other	9

Total: 29 answers

Other:

Role
Statistician
Consumer Reviewer
Methodological editor / Methodological referee
Member of the Advisory Board of the Cochrane CHF
Author
Associate Editor actually
“Lay” Reader – a non-medical person who reads the reviews to ensure their accessibility to non-medical users of the Cochrane Library as well as raising research issues of interest to users.
Project assistant
Consumer Editor

2 - How do you interact with the workflow system?

Answer (MC)	#	%
By using the ticketing system	23	82
By viewing and accessing your current tasks on the Organizer tab in Archie	7	25
By viewing or opening workflow Properties in Archie	7	25
Other	6	21

Total: 28 answers

Other:

Interaction
Please note I have only used the system once!!
I prefer direct email contact with my ME.
Since I am a fairly infrequent user of Archie I struggled to find where I was in it. Our administrator kindly sends me the material I am to comment upon, I do this and send it back to her. This suits me very well.
I receive an email that lets me know I have a ticket. The email has a form attached to type my editorial comments into. When I receive that email I go onto archie and download the pdf of the protocol or review I am to look at. Once I have typed up my comments I use the email to access my ticket - I attach my comments here, and I think this means that the group know I have done my job.
Also by working through tasks in the task list and completing them/making decisions.
My preference is to view & access my tasks on the organizer in ARCHIE;

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

Answer	#	%
Daily	0	0
A few times each week	7	24
Once a week or less	5	17
Once a month or less	17	59

Total: 29 answers

Comments:

Comment
In fact most communication is by email between me and my Managing Editor. The Workflow doesn't seem to contribute a

lot
Again, I have only used the system once.
I log into ARCHIE workflow system each time I have to complete a task as editor assistant.
I have used it as an author
As above
Sometimes I use it more often, we only have workflows set up on some of our reviews and protocols right now
The level of my interaction with the workflow system is dependent on my Mes interaction with the system. At some points I have used the system more often than I am using it now
We currently have only a few workflows in progress but as the number grows I expect to be using the system several times a day.
It varies a lot week to week.
It depends - not always a few times a week - less than that - really depends on flow of work from ME

4 - How good is the workflow system at automatically notifying you when you need to do something in relation to a review in your Group?

Answer	#	%
Very good	14	52
Good	12	44
Poor	0	0
Very poor	1	4

Total: 27 answers

Comments:

Comment
N/A
I have decided not to use the system. Three main reasons: (i) The tickets are unhelpful (they don't link me to a useful place to get on with the task). (ii) Downloading documents from Archie is too time-consuming and fiddly, compared with receiving them with an email. (ii) I'm logged out of Archie too regularly.
I had no problems

I have had limited experience, but the alert through an email is very useful and user friendly. The task can be moved into a task manager system (like outlook). Ease is especially that the link is immediately available and the status of the task is clear.
I have only used it once, but that was fine.
N/A - I haven't been notified via workflows to do tasks.
I have not really understood the ticket system: it seems to indirect.
I find the reminders/notifications useful.
The new email ticket is better, with the link straight to the page for making comments, attaching files etc.
I much prefer to use the viewing and accessing of my current tasks on the Organizer tab in Archie than getting an email

5 – How easy is it to identify all your Cochrane work and their deadline?

Answer	#	%
Very easy	6	22
Easy	16	59
Difficult	3	11
Very difficult	2	7

Total: 27 answers

Comments:

Comment
N/A
I guess it's straightforward to find out what tasks the Review Group has given me, but this is a tiny minority of "all your Cochrane work". However, I won't use a system to help me with task management that requires me to re-enter my password every time I visit it, even within a browsing session.
I would like more experience with it.
I never conquered this I'm afraid. I believe systems need input from utter laggards like me if they are to be effective for everyone - too often they are created by enthusiasts for enthusiasts!
I usually talk the task over with my ME before I get the ticket so the ticket is just a reminder
This supposes that I would be actively looking for my deadlines....
Have not used this feature

I just know that I have a job to do when I see the email. I haven't seen the relevant section in archie (if there is one).
All my Cochrane work is not captured in the Workflow system as far as I understand it, but my interaction with the system has been at the ticketing level only.
I think the system is very user friendly and straightforward.
We have so many reviews underway that it is easy to overlook something unless you are very methodical. We have our own Access-based tracking system, which tells me exactly where I am with any review (if I have kept the information up to date). It's been a bit difficult maintaining two systems - I am still not in the habit of opening Archie every morning to check if there is a task waiting, which is why I prefer the email ticket.
I would like a message a little ahead of when the task needs to be finished.
When tasks are in Organizer tab on ARCHIE - very easy to see what needs to be done - not so with email alerts - these emails get lost in my email with other non-workflow/review tasks & it's not as easy to see exactly what i need to do...

6 - Are there any types of workflow notifications (email alerts) or reports you think should be added to the current system to help you manage your Cochrane work?

Answers:

Answer
As a TSC I would find it useful to receive an automatic notification when a new title (for our group) is registered on Archie
I appreciate being alerted by email because the one time I tried to access Archie the system would not allow me to finish the task. I don't know if this was a problem with the internet or what!!
I would like to know the exact number of the review/revuew protocol version to revise.
No
Not enough experience of the system to answer.
We think that a new task should be added to a protocol asking the TSC to review the search strategy. Although the guidance in the handbook does not require this to be done, we discussed it at the TSC meeting in Singapore and the consensus was that most groups do this. We always do it and so it would be helpful to have this as a task in workflows
Don't know
I am not sure it is entirely necessary, but I would be interested to know what happens to the protocols and reviews I comment on i.e. when authors respond, when the work gets published etc....
Nothing comes to mind.

As a TSC I would like my own "page" where there is information about what I have done against each review. e.g. Protocol Stage: have sent a draft search strategy to the contact author; have completed all search strategies; have checked draft protocol for inclusion of search strategies. Draft Review Stage: have checked draft review for accuracy in text of Search methods section, inclusion of search strategies and accuracy of search dates; have checked if all studies from our register sent to authors are accounted for in included / excluded studies; have checked if search is up to date. Review copy edit stage: have checked all References to studies and Additional references; have checked text of Search methods section

See above - something a few days ahead of the deadline.

Total: 11 answers

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

Answer	#	%
Very Easy	8	28
Easy	19	66
Difficult	1	3
Very Difficult	1	3

Total: 29 answers

Comments:

Comment
The ticketing process appears quite easy, however, the system would not allow my information to go through.
A bit too clunky compared with receiving emails directly from the ME.
As above They must be made very simple and absolutely obvious - i.e. when you log in your tasks must be crystal clear, and everything else should be background.
I have enjoyed two long training sessions!!
The interface itself is easy in terms of going in when you have done the job and attached the file. It would be good to have the protocol or review sitting there to download when you first receive the email and the link to the task. It strikes me as strange that you receive a notification with a link (to let you know you need to make comments on a protocol or review) and when you click on that link it takes you somewhere where you are supposed to upload comments on that protocol or review - even though you have only just received notification that you are required to look at the protocol or review.
The limited interactions I've had have been fairly straightforward
Doesn't do enough for the TSC role

8 - Have you received training or information from your Managing Editor in how to use the workflow system?

Answer	#	%
Yes	12	41
No	12	41
Can't remember	5	17

Total: 29 answers

Specifying YES:

What training
I received an email link that I was able to access. It described what the ticketing system was and how to access it
Very brief
Outline of what 'ticketing' is and how to use it.
Workflow workshop with IMS support person.
Through Cochrane Canada at the Canadian Cochrane Symposium I have attended two workflows workshops
The ME explained it in enough detail
Information by email.
We had a brief session (information giving rather than training) at an editorial meeting earlier this year.
Informal training only, actually more of a discussion than a training session
I self-taught as the system was very straightforward and self explanatory and later received training from [my IMS support person].
Information about workflow system given; 'as you go' and 'as you need' explanations of how to do things / alternatives (e.g. email ticketing vs notification in Archie)
But I only use the Ticketing system - so no training required - guidance is excellent.
Not exactly training but we sat down & discussed workflows, looking at milestones, etc and what various messages would mean for a task that needed attention - as for the rest , it was just looking at the workflow 3 user guide(?) & experimenting & becoming familiar with system as tasks presented themselves - I'm still learning really - not sure I'm aware of all the parts of the system that i can use...

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

Answer (MC)	#	%
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Managing Editor of my CRG	18	69
Archie help	7	27
Workflows in Archie: a Guide for Stage 3 Pilot Groups	5	19
IMS Support person	5	18
Other	1	4

Total: 26 answers

Other source of support:

Source of support
None
None
None
TSC workshop at 2009 Colloquium
None needed - see above

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

Answers:

Answer
Is there some way, the system could also be accessed via email in case the internet decides to act up and inhibit someone from submitting work?
Stop logging me out of Archie.
Nothing!
A comprehensive and easily accessible list of tasks at any time
See above but get laggards involved in any redesign.
Not enough experience to answer.
It would be great if you were able to run reports for individual editors/peer reviewers to see their workload. It would also be useful if there was a way to individually check off whether Licence to publish forms and declaration of interest forms have been signed.
Sorry, not able/willing to go into more detail, as I currently am on holiday

Automatic pop-up of tasks when log on to Archie
That the email that notifies you that you have a job to do takes you straight to the protocol or review that you are being asked to review.
Not sure if this is strictly workflow or not, but it would be great to be able to make editorial changes in Archie.
The searches in our group are NEVER sent only once, almost invariably several searches will be sent during the time the review is being written. The simplest course of action for me has been to handle these outside the system.
Drop the title registration workflow and just start once a title is registered.
Ability to customize the title/protocols/reviews list screen to show what TSC has done for each review
To get a message reminding me a few days ahead of the deadline.
Not sure at this satge - I don't think i have enough experience with system to say...

Total: 16 answers

11 - Any other comments for us to consider?

Answers:

Answer
I stress, again, that I have only used the system once for the Back Review Group and am probably not the best person to reply to this questionnaire. I also admit to being new to a computer, so keeping things simple is very much appreciated.
I received some tickets inviting me to review protocols and reviews. But they didn't include a link to the document, so I considered them unhelpful and asked the ME to stop sending them. It is much easier to receive emails with documents attached. Archie can't be used seriously as a helpful contribution to task management while it continues to log the user out (forgetting the password) every few minutes.
Thanks!
This is massive step forward for busy review groups. Congratulations to development team.
The short notes made when the task is marked as done - where are these stored?
Seems a good system.

Total: 6 answers