



The Cochrane Workflow System

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Cochrane European Entities Meeting
June 11, 2009 Maastricht

Workshop outline



- Background
- Demonstration of workflow system
- Group work and discussion
- Evaluation

Background



What is a workflow?



- An ordered and interrelated sequence of tasks that need to be completed to achieve a finished product (e.g., a published protocol) – sometimes depicted in the form of a “flowchart”
- Involves some decision tasks (“yes/no”), as well as non-decision tasks
- May involve repeating loops or parallel strings of tasks

Other (Archie-specific) terms

- *Workflow type*
A workflow describing a particular editorial process or type of product (e.g., “Title Registration”, “Protocol Development”)
- *Workflow template*
A specific version of a workflow type (e.g., “Protocol Development (version 1.2)”)



Other (Archie-specific) terms

- *CRG workflow template*

A workflow template that has been modified to reflect the way a particular CRG works (e.g., "Protocol Development IBD-FBD (version 1.2)")



Other (Archie-specific) terms

- Workflow Roles
Similar to Document Roles – link specific people with specific tasks in a workflow
- Workflow Manager
Person at the editorial base who starts and manages a workflow



Other (Archie-specific) terms

- Task
Individual task within a workflow – assigned to a specific person or persons via Workflow Roles
- Milestones
Markers indicating that a significant point in the workflow/editorial process has been reached (e.g., authors have submitted their review for editorial approval)



Other (Archie-specific) terms

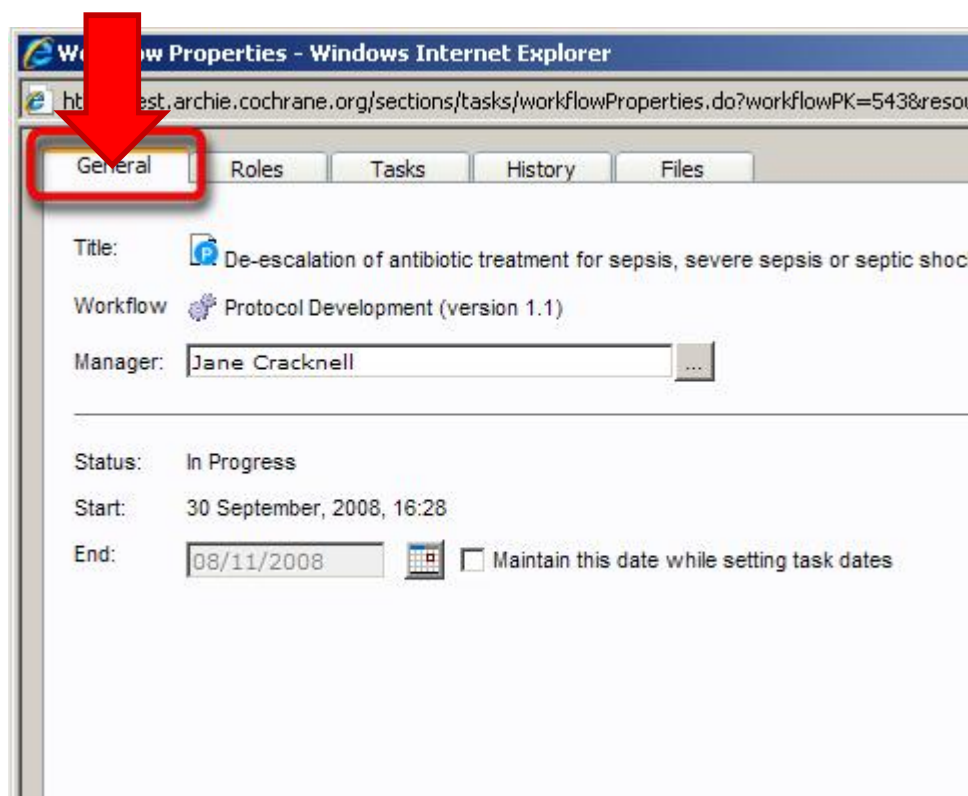
- Ticketing system
Special messaging system within the workflow system
 - Used to inform people outside the editorial base when it is time for them to perform a task
 - Email generated by system is sent to the person assigned to the task; all documents needed to complete the task can be attached to email
 - Recipient accesses a web link to let the Workflow Manager know (via Archie) when the task has been completed and to submit relevant documents (e.g., completed refereeing forms)





WORKFLOW PROPERTIES

Workflow Properties



General tab contains:

- Title of the review
- Name of workflow template
- Name of Workflow Manager
- Status (e.g., Not Started, In Progress, Completed)
- Start and end dates for the workflow as a whole

Workflow Properties



Workflow Properties - Windows Internet Explorer

http://test.archie.cochrane.org/sections/tasks/workflowProperties.do?workflowPK=4841

General **Roles** Tasks History Files

CRG Advisor:
Cracknell, Jane

Editorial Base:

Trial Search Coordinator:

Contact Person:

Contact Editor:

External Referee:
Cracknell, Jane

Copy Editor:

Sign-off Editor:

Roles tab contains information about the people associated with the workflow, e.g., Contact Person, Contact Editor, External Referees

Workflow Properties



Task	Assigned To	Role	Start	End or Due	Duration	Overdue
Not Started						
1 Perform literature searches	Karen Hovhannisyann	Trial Search Coord	03/03/2009	17/03/2009	14 days	
2 Submit draft review for editorial approval	Vesna Svircevic	Contact Person	17/03/2009	17/03/2010	365 days	
5 Identify potential External Referees	Karen Hovhannisyann	Editorial Base	17/03/2010	24/03/2010	7 days	
A Draft review submitted for editorial approval			17/03/2010			
4 Identify CRG Advisors	Karen Hovhannisyann	Editorial Base	17/03/2010	24/03/2010	7 days	
3 Identify Sign-off Editor	Karen Hovhannisyann	Editorial Base	17/03/2010	18/03/2010	1 days	
6.1 Make draft review available to CRG A	Karen Hovhannisyann	Editorial Base	24/03/2010	25/03/2010	1 days	
7.1 Review and comment on draft review	Karen Hovhannisyann	Internal Referee	25/03/2010	26/03/2010	1 days	
8.1 Decision: Comments clear and complete	Karen Hovhannisyann	Editorial Base	26/03/2010	27/03/2010	1 days	
9 Send comments to Contact Editor	Karen Hovhannisyann	Editorial Base	27/03/2010	03/04/2010	7 days	
10 Prepare comments for presentation to	Jane C Ballantyne	Contact Editor	03/04/2010	17/04/2010	14 days	
11 Decision: Comments appropriately prepared	Karen Hovhannisyann	Editorial Base	17/04/2010	19/04/2010	2 days	
12 Send comments to Contact Person	Karen Hovhannisyann	Editorial Base	19/03/04/2010	19/04/2010	1 days	
13 Submit revised review for editorial approval	Vesna Svircevic	Contact Person	20/04/2010	11/05/2010	21 days	
14 Decision: Does revised review reflect	Karen Hovhannisyann	Editorial Base	11/05/2010	14/05/2010	3 days	
B Internal CRG check completed			14/05/2010			
15.1 Invite potential External Referee to participate	Karen Hovhannisyann	Editorial Base	14/05/2010	15/05/2010	1 days	
16.1 Decision: Agree to serve as External Referee	Karen Hovhannisyann	External Referee	15/05/2010	31/05/2010	16 days	
18.1 Make draft review available to External Referee	Karen Hovhannisyann	Editorial Base	31/05/2010	01/06/2010	1 days	
17.1 Invite another potential External Referee	Karen Hovhannisyann	Editorial Base	31/05/2010	07/06/2010	7 days	

Skip tasks until: (Check this box and press start to skip all tasks before selected task.)

Tasks tab provides a listing (with details) of the individual tasks that make up the workflow, along with milestones

Workflow Properties



General Roles Tasks **History** Files

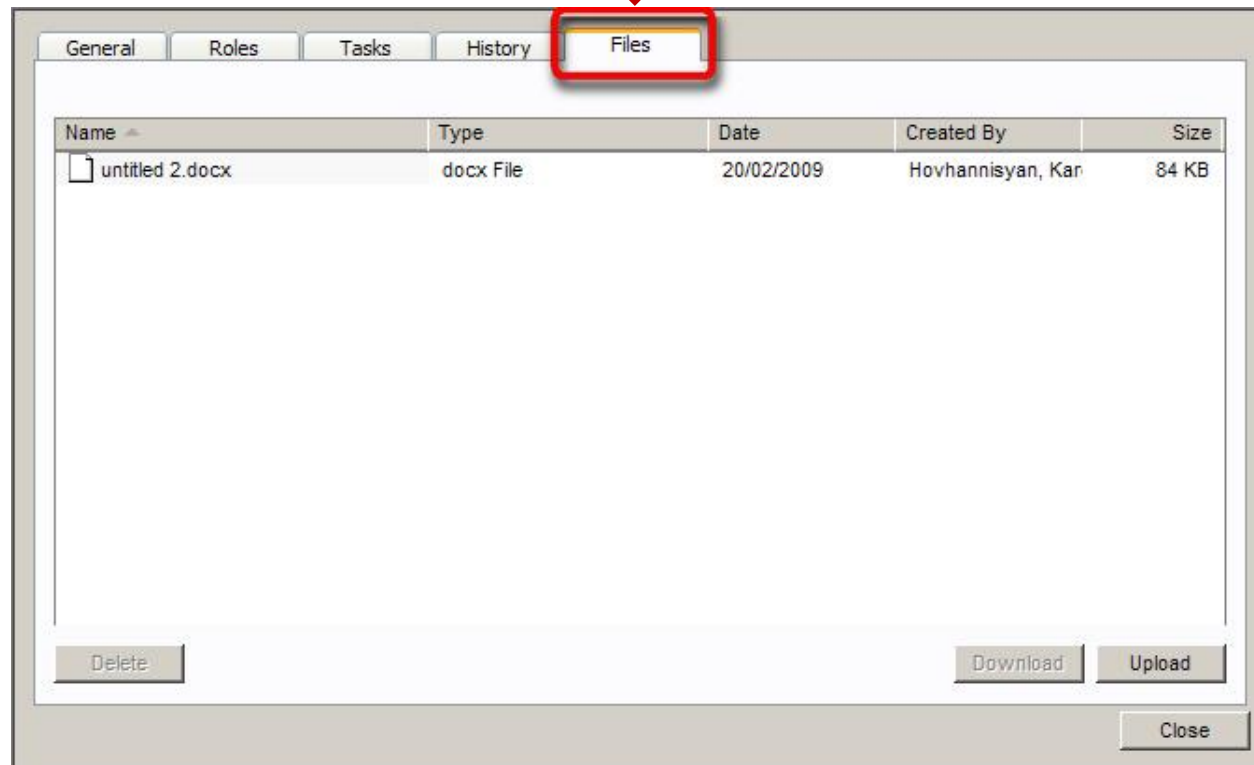
History:

Date / time	Event	User	Task	Details
26 Mar, 2009, 11:42:35 GMT	Date changed	Jane Cracknell	Submit revised review for editorial approval	Due date changed from 28 Mar, 2009 30 Jun, 2009.
26 Mar, 2009, 11:41:47 GMT	Task started	System	Submit revised review for editorial approval	Task started.
26 Mar, 2009, 11:41:47 GMT	Status changed	Jane Cracknell	Send comments to Contact Person	Status changed from In Progress to Completed.
26 Mar, 2009, 11:41:47 GMT	Task done	System	Send comments to Contact Person	
26 Mar, 2009, 11:41:16 GMT	Task started	System	Send comments to Contact Person	Expected task start date changed from Jan, 2009 to 26 Mar, 2009. Expected task end date changed from Feb, 2009 to 27 Mar, 2009. Task started.
26 Mar, 2009, 11:41:16 GMT	Task changed	System	Send Licence for Publication forms to Secretariat	Expected task start date changed from Feb, 2009 to 10 Jun, 2009. Expected task end date changed from Feb, 2009 to 11 Jun, 2009.
26 Mar, 2009, 11:41:16 GMT	Task changed	System	Notify Contact Person of publication	Expected task start date changed from Feb, 2009 to 9 Jun, 2009. Expected task end date changed from Feb, 2009 to 10 Jun, 2009.
				Expected task start date changed from

Notes:

History tab shows the chronology of events in the “life” of the workflow. Most events are created automatically, but there is also a Notes field where the Workflow Manager can add notes manually.

Workflow Properties

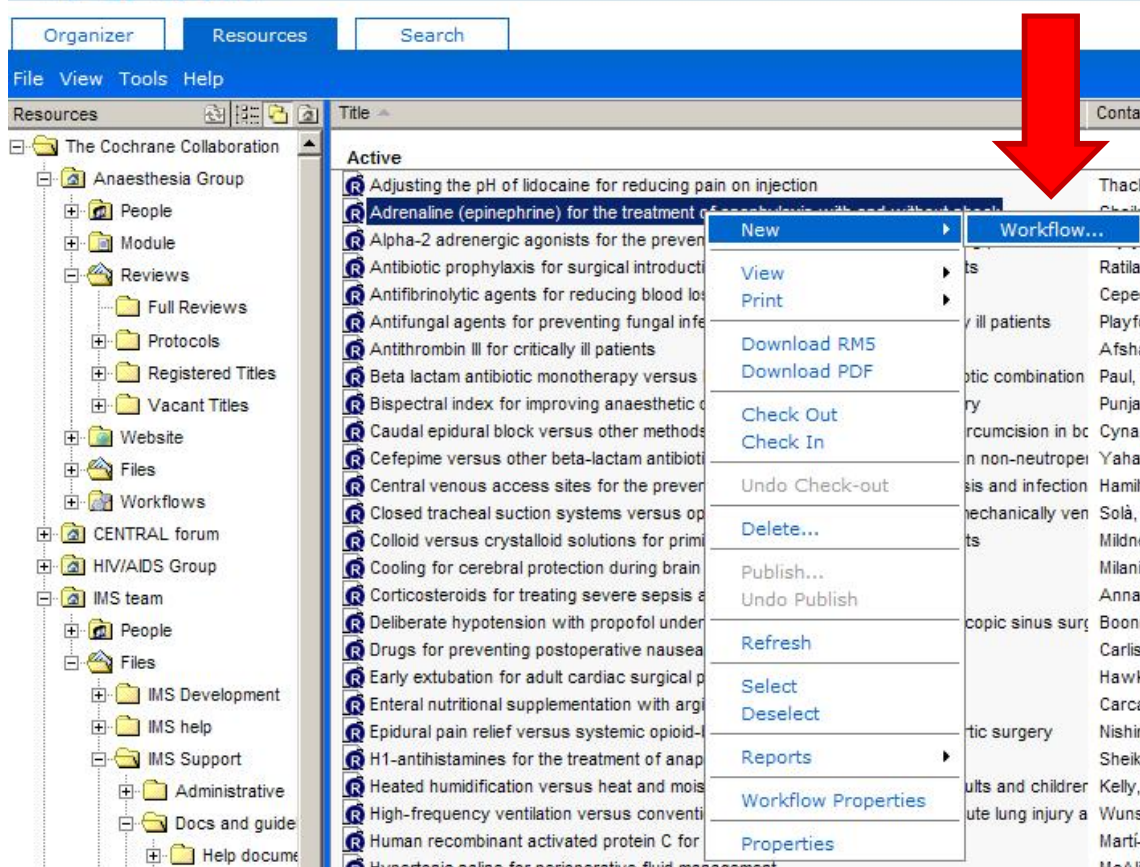


The **Files tab** can be used to store files related to the workflow (e.g., the completed Title Registration Form, refereeing forms).



SETTING UP AND STARTING A NEW WORKFLOW

Starting a new workflow

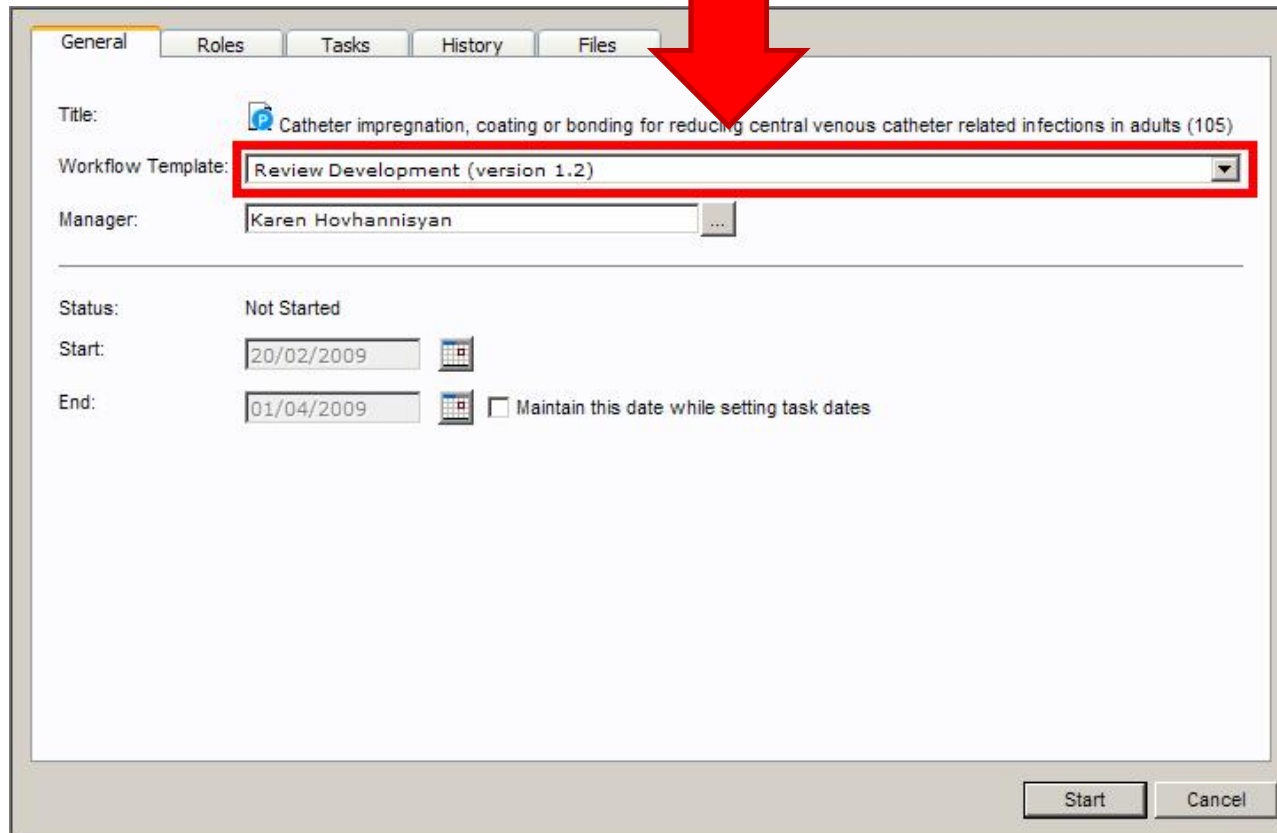


To start a new workflow:

- Right-click the name of the review under Resources
- Choose New Workflow...

Starting a new workflow


From the pull-down menu
choose a Workflow Template




The screenshot shows a dialog box for creating a new workflow. The 'General' tab is selected. The 'Title' field contains 'Catheter impregnation, coating or bonding for reducing central venous catheter related infections in adults (105)'. The 'Workflow Template' dropdown menu is highlighted with a red box and contains 'Review Development (version 1.2)'. The 'Manager' field contains 'Karen Hovhannisyan'. The 'Status' is 'Not Started'. The 'Start' date is '20/02/2009' and the 'End' date is '01/04/2009'. There is a checkbox for 'Maintain this date while setting task dates' which is unchecked. At the bottom right, there are 'Start' and 'Cancel' buttons.

Starting a new workflow

The screenshot displays the 'General' tab of a workflow configuration interface. The 'Title' is 'Catheter impregnation, coating'. The 'Workflow Template' is 'Review Development (v.2)'. The 'Manager' is 'Karen Hovhannis'. The 'Status' is 'Not Started'. The 'Start' date is '20/02/2009' and the 'End' date is '01/04/2009'. A red box highlights the date input fields, and a red arrow points from a text box above to the 'Start' date field. A calendar popup window is open, showing February 2009, with the date '20' selected. A red box highlights the calendar window. A text box below the calendar explains how to close it to save changes.

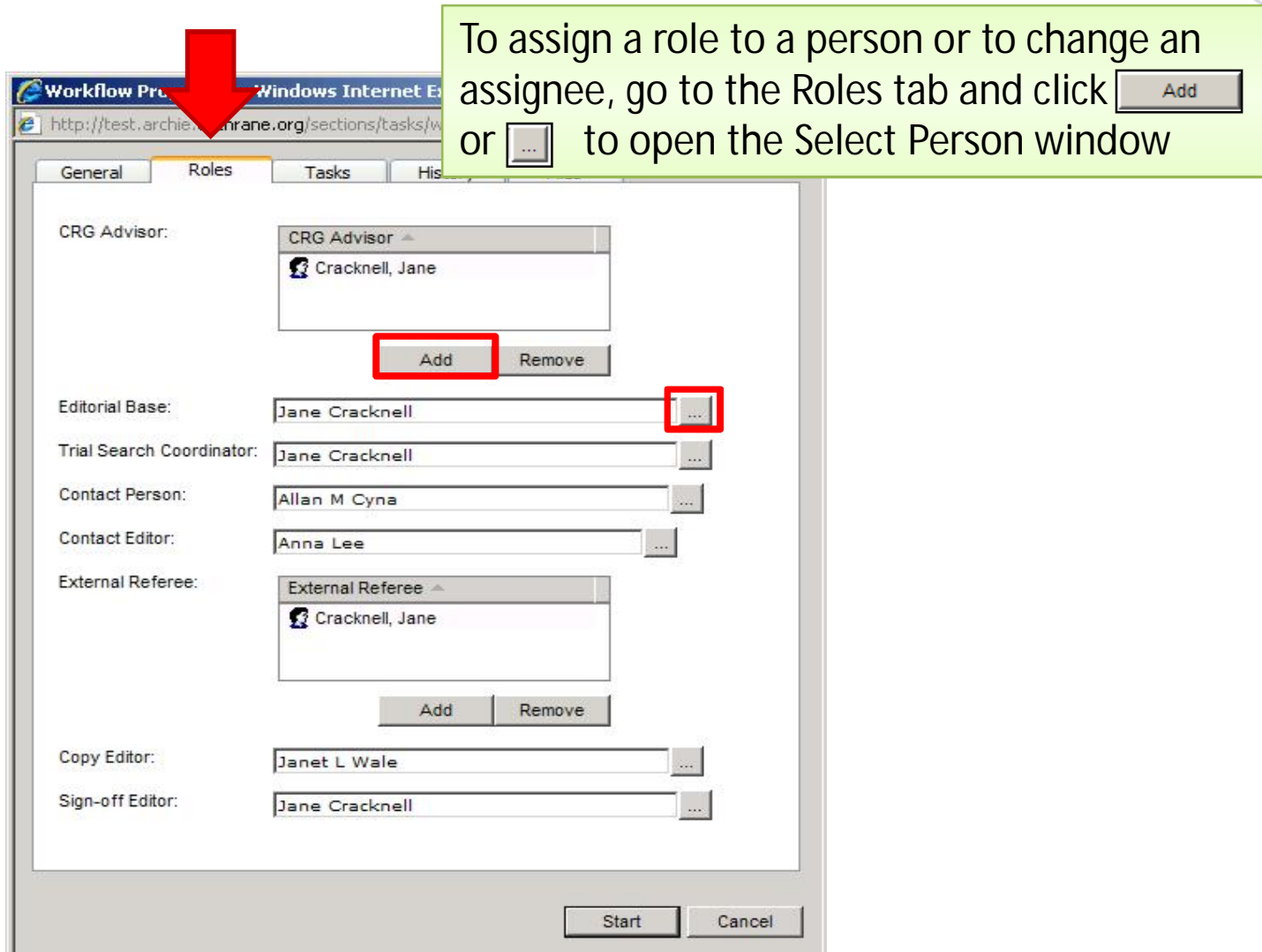
To change the Start and End dates of the workflow click  to open the calendar

In the calendar choose the date and click  (close button) to make the change

M	T	W	T	F	S	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

Starting a new workflow

To assign a role to a person or to change an assignee, go to the Roles tab and click or to open the Select Person window



The screenshot shows the 'Roles' tab of a workflow process. The roles and their assigned personnel are:

- CRG Advisor: Cracknell, Jane (with an 'Add' button highlighted in red)
- Editorial Base: Jane Cracknell (with a '...' button highlighted in red)
- Trial Search Coordinator: Jane Cracknell
- Contact Person: Allan M Cyna
- Contact Editor: Anna Lee
- External Referee: Cracknell, Jane (with 'Add' and 'Remove' buttons)
- Copy Editor: Janet L Wale
- Sign-off Editor: Jane Cracknell

At the bottom of the window are 'Start' and 'Cancel' buttons.

Starting a new workflow

In the Select Person window type the name in the search field and click

Name	Email	Primary Entity	Modified
Playford, E Diane	d.playford@ion.ucl.ac.uk	Movement Disorders Group	12/11/2000 00:00
Playford, Elliott Geoffrey	geoffrey_playford@health.qld.gov.	Gynaecological Cancer Group	24/04/2006 11:44

2 person(s) found

< Previous 1 Next >

Click the correct person's name

Click to finish

Starting a new workflow

Task	Assigned To	Role	Start	End or Due	Duration	Overdue
5 Identify potential External Referees	Karen Hovhannisyan	Editorial Base	17/03/2010	24/03/2010	7 days	
A Draft review submitted for editorial ap						
17/03/2010						
4 Identify CRG Advisors	Karen Hovhannisyan	Editorial Base	17/03/2010	24/03/2010	7 days	
3 Identify Sign-off Editor	Karen Hovhannisyan	Editorial Base	17/03/2010	18/03/2010	1 days	
6.1 Make draft review available to CRG A	Karen Hovhannisyan	Editorial Base	24/03/2010	25/03/2010	1 days	
7.1 Review and comment on draft review	Karen Hovhannisyan	Internal Referee	25/03/2010	26/03/2010	1 days	
8.1 Decision: Comments clear and compl	Karen Hovhannisyan	Editorial Base	26/03/2010	27/03/2010	1 days	
9 Send comments to Contact Editor	Karen Hovhannisyan	Editorial Base	27/03/2010	03/04/2010	7 days	
10 Prepare comments for presentation to	Jane C Ballantyne	Contact Editor	03/04/2010	17/04/2010	14 days	
11 Decision: Comments appropriately pre	Karen Hovhannisyan	Editorial Base	17/04/2010	19/04/2010	2 days	
12 Send comments to Contact Person	Karen Hovhannisyan	Editorial Base	19/04/2010	20/04/2010	1 days	
13 Submit revised review for editorial ap	Vesna Svircevic	Contact Person	20/04/2010	11/05/2010	21 days	
14 Decision: Does revised review reflect	Karen Hovhannisyan	Editorial Base	11/05/2010	14/05/2010	3 days	
B Internal CRG check completed						
14/05/2010						
15.1 Invite potential External Referee to p	Karen Hovhannisyan	Editorial Base	14/05/2010	15/05/2010	1 days	
16.1 Decision: Agree to serve as Extern	Karen Hovhannisyan	External Referee	15/05/2010	31/05/2010	16 days	
18.1 Make draft review available to Exter	Karen Hovhannisyan	Editorial Base	31/05/2010	01/06/2010	1 days	
17.1 Invite another potential External Refi	Karen Hovhannisyan	Editorial Base	31/05/2010	07/06/2010	7 days	
19.1 Review and comment on draft revie	Karen Hovhannisyan	External Referee	01/06/2010	02/06/2010	1 days	
20.1 Decision: Comments clear and comp	Karen Hovhannisyan	Editorial Base	02/06/2010	03/06/2010	1 days	
C External refereeing completed						
07/06/2010						
21 Send comments to Contact Editor	Karen Hovhannisyan	Editorial Base	07/06/2010	09/06/2010	2 days	

Skip tasks until: (Check this box and press start to skip all tasks before selected task.)

Identify Sign-off Editor

Start

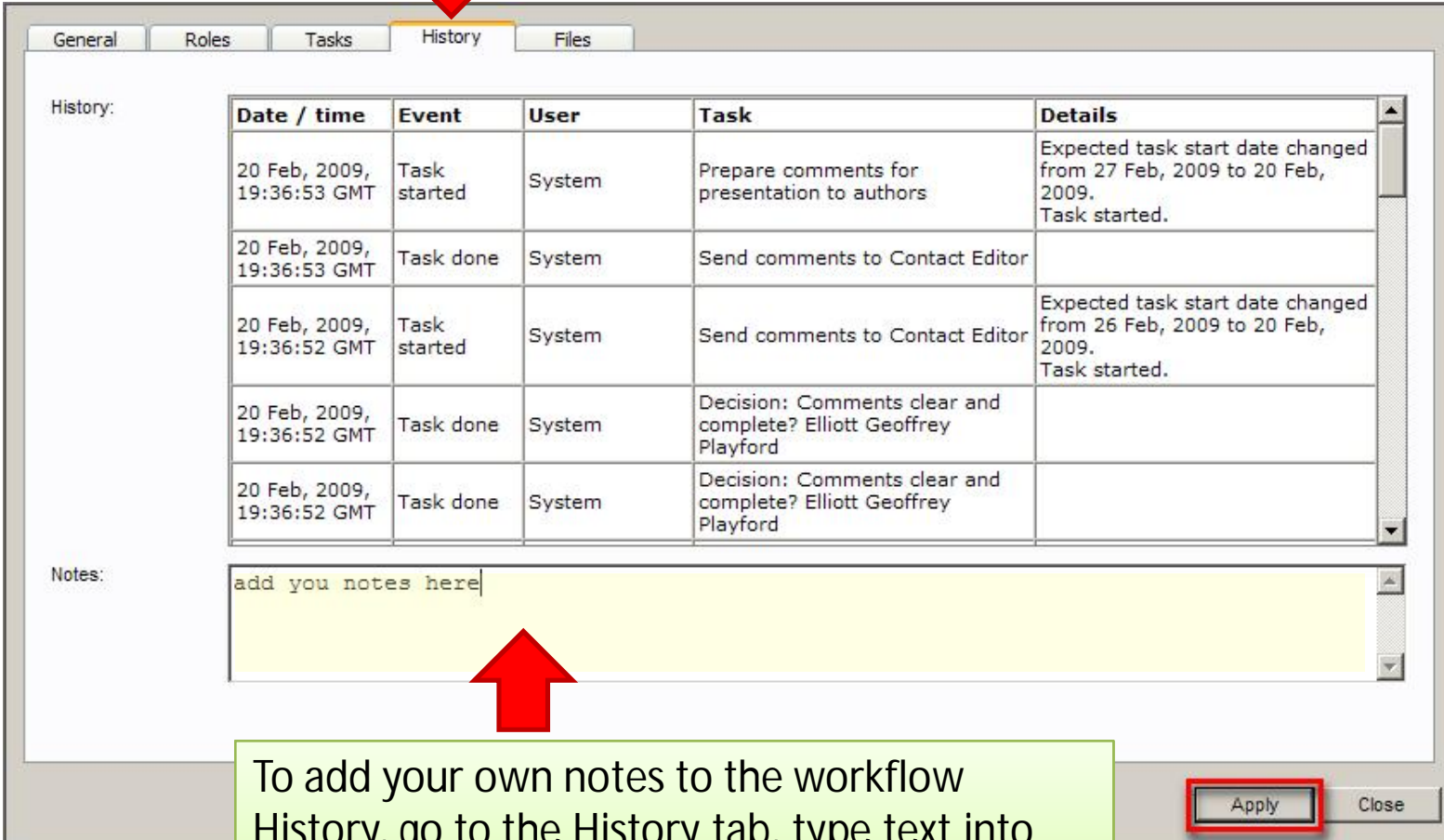
Start

Cancel

To start the workflow, click

To skip a series of already completed tasks before starting the workflow, click the task you want to begin with and then tick the box under "Skip tasks until"

Adding notes to History

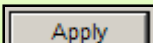


The screenshot shows the Cochrane Information Management System interface. The 'History' tab is selected, and a table displays a list of events. Below the table is a 'Notes' box with the placeholder text 'add your notes here'. A red arrow points to the 'Notes' box, and another red arrow points to the 'Apply' button in the bottom right corner of the interface.

Date / time	Event	User	Task	Details
20 Feb, 2009, 19:36:53 GMT	Task started	System	Prepare comments for presentation to authors	Expected task start date changed from 27 Feb, 2009 to 20 Feb, 2009. Task started.
20 Feb, 2009, 19:36:53 GMT	Task done	System	Send comments to Contact Editor	
20 Feb, 2009, 19:36:52 GMT	Task started	System	Send comments to Contact Editor	Expected task start date changed from 26 Feb, 2009 to 20 Feb, 2009. Task started.
20 Feb, 2009, 19:36:52 GMT	Task done	System	Decision: Comments clear and complete? Elliott Geoffrey Playford	
20 Feb, 2009, 19:36:52 GMT	Task done	System	Decision: Comments clear and complete? Elliott Geoffrey Playford	

Notes: add your notes here

Apply Close

To add your own notes to the workflow History, go to the History tab, type text into the Notes box, and click 

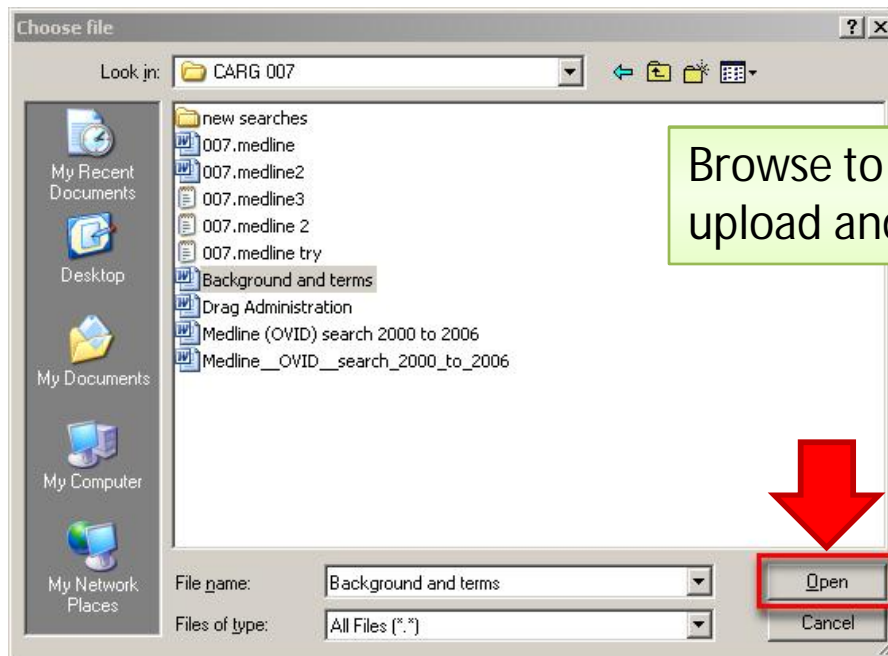
Uploading files to the workflow Properties

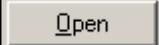
The screenshot shows the 'Files' tab of the Cochrane Information Management System. A pop-up window titled 'Upload Document - Windows Internet Expl...' is open, displaying the URL 'http://test.archie.cochrane.org/uploadWorkflowDocument'. The pop-up window has an 'Upload' section with a 'Locate file on your computer:' field and a 'Browse...' button. A red arrow points to the 'Browse...' button. Below the pop-up window, a red arrow points to the 'Upload' button in the main application window. A green callout box contains the text: 'In the pop-up window, click **Browse...** to access the files saved on your computer'. Another green callout box at the bottom contains the text: 'To upload a file into the workflow Properties, go to the Files tab and click **Upload**'.

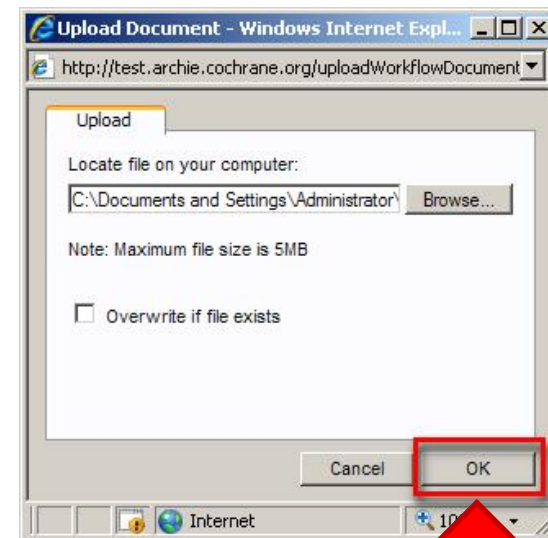
In the pop-up window, click **Browse...** to access the files saved on your computer

To upload a file into the workflow Properties, go to the Files tab and click **Upload**

Uploading files to the workflow Properties



Browse to the file you want to upload and click 



Click OK to finish the upload



ACCESSING AN EXISTING WORKFLOW

Accessing an existing workflow

To access or view your CRG's existing workflows go to the Resources tab and open your Workflows folder

TEST SERVER
FOR TEST PURPOSES ONLY
EXPECT ERRORS AND ODD BEHAVIOUR

Quick Search:

Karen Hovhannisyian
Anaesthesia Group

Title	Rev No	Workflow	Manager	Start	Last Milestone Passed	End or Due
Not Started						
Catheter impregnation, coating or bonding f	105	Review Development	Karen Hovhannisyian	20/02/2009 14:50		01/04/2009 15:50
Catheter impregnation, coating or bonding f	105	Review Development	Karen Hovhannisyian	20/02/2009 18:50		01/04/2009 19:50
Closed tracheal suction systems versus o	081	Review Development	Karen Hovhannisyian	17/02/2009 13:23		29/03/2009 14:23
Continuous interscalene blockade versus p	054	Review Development	Karen Hovhannisyian	20/02/2009 14:51		01/04/2009 15:51
Cooling for cerebral protection for brain sui	141					
Intra-operative warming for prevention of o	183					
In Progress						
Adjunctive Hyperbaric oxygen for necrotizi	133					
Central venous catheter (CVC) removal for	185					
Classic laryngeal mask airway versus ProE						
Cooling for cerebral protection for brain sui	141					
De-escalation of antibiotic treatment for sei	179					
Effect of alcohol intervention on postoperat		Title Registration	Jane Cracknell	22/10/2008 14:13		12/01/2009 14:14
Efficiency and safety of a continuous periop						
Ethyl Chloride and other vapocoolants for p	170					
Exercise rehabilitation for recovery from cr	172					
General versus regional anaesthesia for ct						
General versus regional anaesthesia for ch						
Immunotherapy for food allergy						
Intensive insulin therapy and strict glucose						
Interventions for improving intubating condi						
Local anaesthesia for patients undergoing						
Lung recruitment manoeuvres for mechanik						
Perioperative angiotension-converting enzy						
pH testing for detecting the position of nas	159					
Pharmacological intervention for the treatm						
Pharmacological interventions for reducing	178					
Positive end-expiratory pressure (PEEP) du	057					
ProSeal versus classical laryngeal mask ai						
Completed						
Interventions for improving intubating condi						
Local anaesthesia for patients undergoing		Title Registration	Jane Cracknell	22/10/2008 14:52		22/10/2008 15:03
Non-invasive positive pressure ventilation f		Title Registration	Jane Cracknell	30/09/2008 16:24		23/10/2008 18:08
regional analgesia can reduce the risk of re		Title Registration	Jane Cracknell	06/10/2008 15:03		09/10/2008 14:19
Aborted						
Aromatherapy for treatment of postoperath	176	Protocol Development	Jane Cracknell	01/10/2008 15:57		08/11/2008 14:57

In the Workflows folder, workflows are divided according to their status, e.g., Not Started, In Progress, Completed, or Aborted

Columns of the display show the review title, review number, workflow type, Workflow Manager, start date, last milestone passed, and end/due date

To access an individual workflow double-click the title of the workflow or right-click and choose Properties







Accessing an existing workflow

The screenshot shows the Archie software interface. The left sidebar displays a tree view of the 'The Cochrane Collaboration' structure, including folders for 'Anaesthesia Group', 'People', 'Module', 'Reviews', 'Full Reviews', 'Protocols', 'Registered Titles', 'Vacant Titles', 'Website', 'Files', and 'Workflows'. The main window shows a list of reviews under the 'Active' tab. A context menu is open over the review 'Catheter impregnation, coating or bonding for reducing central venous catheter-related bloodstream infections'. The menu options include 'View', 'Print', 'Download (XML format)', 'Download (PDF format)', 'Check Out (XML format)', 'Check In (XML format)', 'Undo Check-out', 'Delete...', 'Publish...', 'Undo Publish', 'Convert to RevMan 5 Format', 'Refresh', 'Select', 'Deselect', 'Reports', 'New Workflow...', 'Workflow Properties', and 'Properties'. A red arrow points to the 'Workflow Properties' option.

Title	Contact Person	Rev No
Adjunctive Hyperbaric oxygen for necrotizing fasciitis	Levett, Denny	133
Aerosolized prostacyclin for acute respiratory distress syndrome (ARDS)	Afshari, Arash	169
Anaesthesia for cardioversion	Khalaiwi, Khalid A	117
Anaesthetic interventions for prevention of awareness during surgery	Messina, Anthony	130
Analgo-sedation for diagnostic and therapeutic endoscopic or radiologic procedures	Delgado, Martha	050
Aromatherapy for treatment of postoperative nausea and vomiting	Hines, Sonia	176
Catheter impregnation, coating or bonding for reducing central venous catheter-related bloodstream infections		
Cefepime versus other beta-lactam antibiotics for the treatment of infections		
Colloid versus crystalloid solutions for priming cardiopulmonary bypass		
Continuous interscalene blockade versus parenteral analgesia for postoperative pain		
Cooling for cerebral protection for brain surgery		
De-escalation of antibiotic treatment for sepsis, severe sepsis or septic shock		
Deliberate hypotension with propofol under anaesthesia for functional end-tidal CO2		
Drugs for the prevention and treatment of pruritus in patients receiving opioids		
Early versus late pre-intensive care unit admission broad spectrum antibiotic therapy		
Early versus late removal of laryngeal mask airway (LMA) for general anaesthesia		
Early versus late tracheostomy for critically ill patients		
Epidural analgesia for cardiac surgery		
General anaesthetic agents for evoked potential monitoring during surgery		
Glucocorticoids for the treatment of anaphylaxis		
Glucose-insulin-potassium (GIK) and tight-glycaemic-control (TGC) versus standard care for critically ill patients		
Heparin versus normal saline for patency of arterial lines		
High concentration versus low concentration sevoflurane for anaesthesia		
Hypocaloric nutrition support for critically ill adults		
Injectable local anaesthetic agents for operative dental anaesthesia		
Inspired oxygen concentration during surgery for preventing surgical site infections		
Intensive insulin therapy and strict glucose control for critically ill patients		
Interventions for preventing hypotension in adults receiving spinal anaesthesia		
Interventions for restoring patency of occluded central venous catheters		
Intravenous catheter versus venipuncture for blood specimen collection		
Laryngeal mask airway versus endotracheal tube in laparoscopic gynaecology		
Lateral positioning for critically ill adult patients	Hewitt, Nicky	164

You can also open the Properties of an existing workflow from within the Reviews folder by right-clicking the name of the review and choosing Workflow Properties

Right-click menu in Workflows folder

Not Started		
 Catheter impregnation, coating or bonding for reducing ce	105	Review Development
 Catheter impregnation, coating or bonding for reducing ce	105	Review Development
 Closed tracheal suction systems versus open tracheal su	081	Review Development
 Continuous interscalene blockade versus parenteral anal	054	Review Development
 Cooling for cerebral protection for brain surgery	141	Review Development
 Intra-operative warming for prevention of operative comp	183	Protocol Development
In Progress		
 Adjunctive Hyperbaric oxygen for necrotizing fasciitis	133	Protocol Development
 Central venous catheter (CVC) removal for adult patients	185	Protocol Development
 Classic laryngeal mask airway versus ProSeal laryngeal		Title Registration
 Cooling for cerebral protection for brain surgery	141	Protocol Development
 De-escalation of antibiotic treatment for sepsis, severe s	179	Protocol Development
 Effect of alcohol intervention on postoperative comp		Title Registration
 Efficiency and safety of a continuous perioperative lid		Title Registration
 Ethyl Chloride and other vapocoolants for pain treatm		Protocol Development
 Exercise rehabilitation for recovery from critical illnes		Protocol Development
 General versus regional anaesthesia for cognitive dy		Title Registration
 General versus regional anesthesia for changes of f		Title Registration
 Immunotherapy for food allergy		Title Registration
 Intensive insulin therapy and strict glucose control fo		Title Registration
 Interventions for improving intubating conditions during di		Title Registration
 Local anaesthesia for patients undergoing pars plana vitr		Title Registration

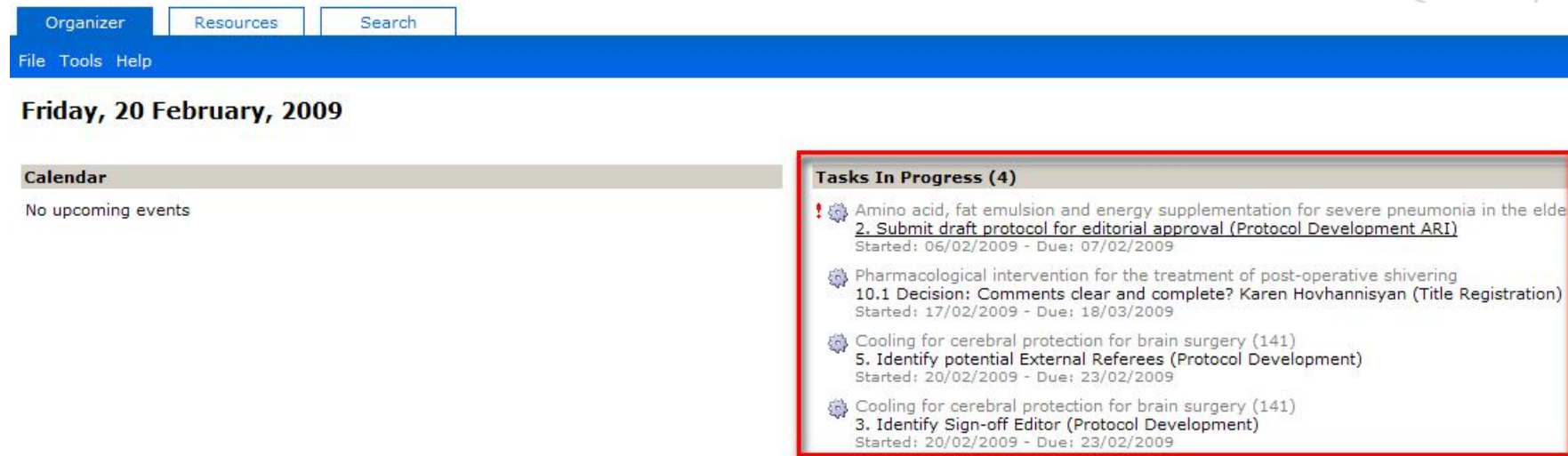


- Within the Workflows folder, the right-click menu allows you to perform certain actions in relation to a specific workflow
- The right-click menu also allows you to view the Workflow Report (more on this later)



ACCESSING AND WORKING WITH TASKS

Accessing tasks



The screenshot shows the Archie interface. At the top, there are tabs for 'Organizer', 'Resources', and 'Search'. Below these is a blue menu bar with 'File', 'Tools', and 'Help'. The main content area shows the date 'Friday, 20 February, 2009'. On the left, there is a 'Calendar' section with the text 'No upcoming events'. On the right, a red-bordered box highlights the 'Tasks In Progress (4)' section. This section lists four tasks, each with a gear icon and a start/end date. The first task has a red exclamation mark icon, indicating it is overdue.

Organizer Resources Search

File Tools Help

Friday, 20 February, 2009

Calendar

No upcoming events

Tasks In Progress (4)

- ! ⚙️ Amino acid, fat emulsion and energy supplementation for severe pneumonia in the elderly
2. Submit draft protocol for editorial approval (Protocol Development ARI)
Started: 06/02/2009 - Due: 07/02/2009
- ⚙️ Pharmacological intervention for the treatment of post-operative shivering
10.1 Decision: Comments clear and complete? Karen Hovhannisyan (Title Registration)
Started: 17/02/2009 - Due: 18/03/2009
- ⚙️ Cooling for cerebral protection for brain surgery (141)
5. Identify potential External Referees (Protocol Development)
Started: 20/02/2009 - Due: 23/02/2009
- ⚙️ Cooling for cerebral protection for brain surgery (141)
3. Identify Sign-off Editor (Protocol Development)
Started: 20/02/2009 - Due: 23/02/2009

- You can see a list of “In Progress” tasks assigned to you in the Organizer tab in Archie
- To open a task’s Properties, click the name of the task
- The exclamation mark ⚠️ ⚙️ in front of a task means that the task is overdue

Accessing tasks


The screenshot shows the 'Tasks' tab of the CIMS interface. A red arrow points to the 'Tasks' tab. The table below lists the tasks:

Task	Assigned To	Role	Start	End or Due	Duration	Overdue
5 Identify potential External Referees	Karen Hovhannisyian	Editorial Base	17/03/2010	24/03/2010	7 days	
A Draft review submitted for editorial ap						
4 Identify CRG Advisors	Karen Hovhannisyian	Editorial Base	17/03/2010	24/03/2010	7 days	
3 Identify Sign-off Editor	Karen Hovhannisyian	Editorial Base	17/03/2010	18/03/2010	1 days	
6.1 Make draft review available to CRG A	Karen Hovhannisyian	Editorial Base	24/03/2010	25/03/2010	1 days	
7.1 Review and comment on draft review	Karen Hovhannisyian	Internal Referee	25/03/2010	26/03/2010	1 days	
8.1 Decision: Comments clear and compl	Karen Hovhannisyian	Editorial Base	26/03/2010	27/03/2010	1 days	
9 Send comments to Contact Editor	Karen Hovhannisyian	Editorial Base	27/03/2010	03/04/2010	7 days	
10 Prepare comments for presentation to	Jane C Ballantyne	Contact Editor	03/04/2010	17/04/2010	14 days	
11 Decision: Comments appropriately pre	Karen Hovhannisyian	Editorial Base	17/04/2010	19/04/2010	2 days	
12 Send comments to Contact Person	Karen Hovhannisyian	Editorial Base	19/04/2010	20/04/2010	1 days	
13 Submit revised review for editorial ap	Vesna Svircevic	Contact Person	20/04/2010	11/05/2010	21 days	
14 Decision: Does revised review reflect	Karen Hovhannisyian	Editorial Base	11/05/2010	14/05/2010	3 days	
B Internal CRG check completed						
15.1 Invite potential External Referee to p	Karen Hovhannisyian	Editorial Base	14/05/2010	15/05/2010	1 days	
16.1 Decision: Agree to serve as Extern:	Karen Hovhannisyian	External Referee	15/05/2010	31/05/2010	16 days	
18.1 Make draft review available to Exter	Karen Hovhannisyian	Editorial Base	31/05/2010	01/06/2010	1 days	
17.1 Invite another potential External Refi	Karen Hovhannisyian	Editorial Base	31/05/2010	07/06/2010	7 days	
19.1 Review and comment on draft revie	Karen Hovhannisyian	External Referee	01/06/2010	02/06/2010	1 days	
20.1 Decision: Comments clear and comp	Karen Hovhannisyian	Editorial Base	02/06/2010	03/06/2010	1 days	
C External refereeing completed						
21 Send comments to Contact Editor	Karen Hovhannisyian	Editorial Base	07/06/2010	09/06/2010	2 days	

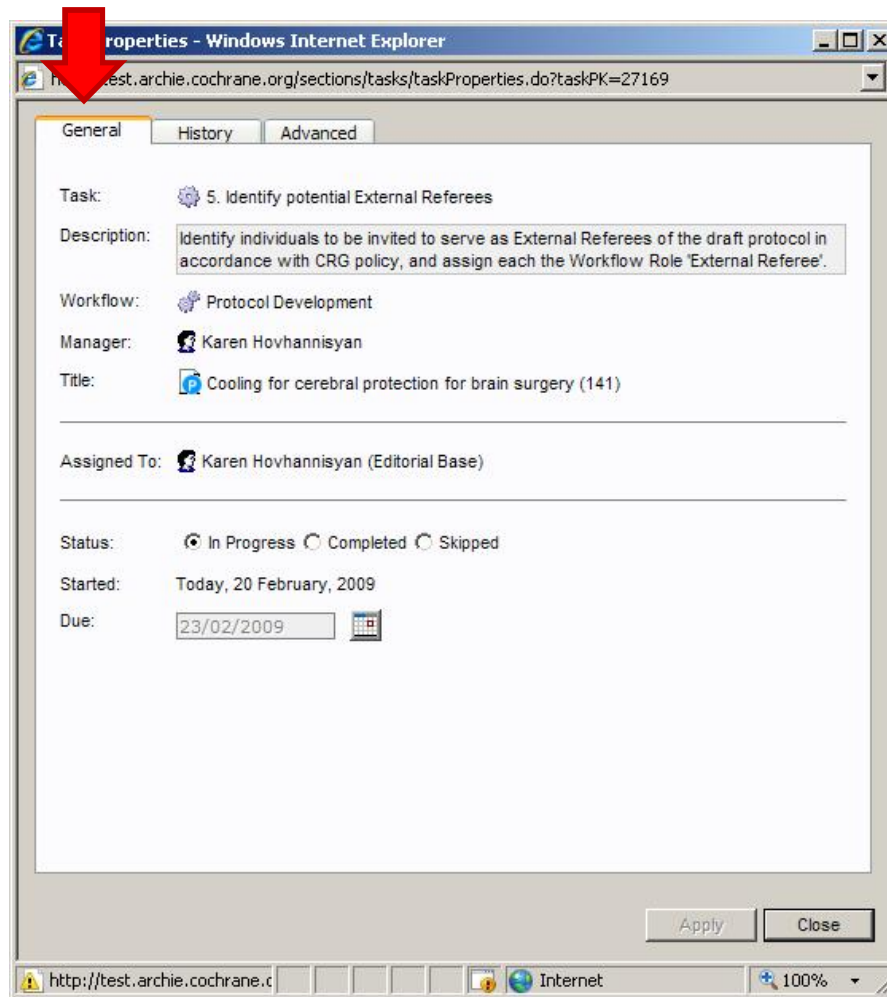
Skip tasks until: (Check this box and press start to skip all tasks before selected task.)

Identify Sign-off Editor

Properties

- You can also access tasks on the Tasks tab of the workflow Properties
- To open a task's Properties, double-click the name of the task or click the name of the task and click 

Task Properties



General tab contains:

- Name and number of the task
- Description of the task
- Workflow type
- Workflow Manager
- Review title
- Name of the person to whom the task has been assigned ("task assignee")
- Status of the task (In progress, Completed, or Skipped)
- Dates started and due

Task Properties



Task Properties

http://test.archie.cochrane.org/sections/tasks/taskProperties.do?taskPK=27169

General History Advanced

History:

Date / time	Event	User	Details
20 Feb, 2009, 19:36:50 GMT	Task started	System	Task started.
20 Feb, 2009, 19:36:47 GMT	Task changed	System	Expected task start date changed from 22 Feb, 2009 to 20 Feb, 2009.
20 Feb, 2009, 19:36:40 GMT	Workflow started.	Karen Hovhannisyan	Expected start date at start of Workflow: 22 Feb, 2009. Expected due date at start of Workflow: 23 Feb, 2009.

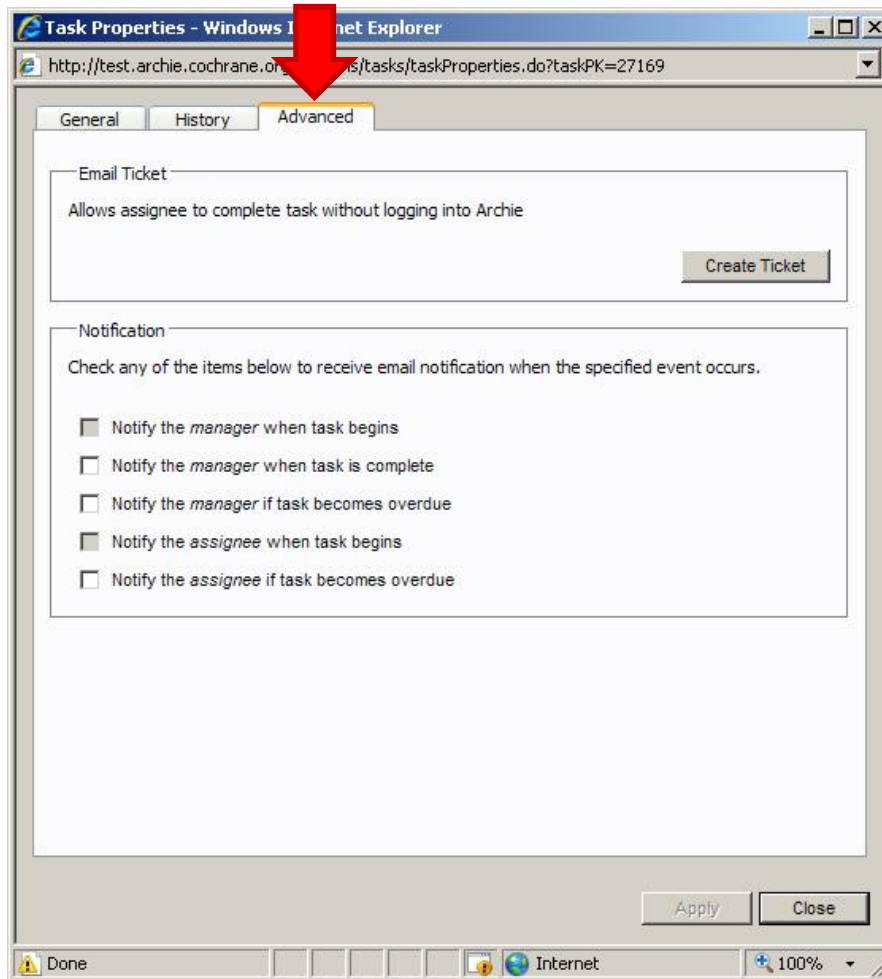
Notes:

Apply Close

Done, but with errors on pag Internet 100%

- The History tab shows the chronology of events related to the task
- Most events are created automatically
- There is also a Notes field where the Workflow Manager can add notes about the task manually (as on the workflow History tab)

Task Properties



- On the Advanced tab you can create an email Ticket to allow the task assignee to complete the task without logging into Archie
- You can also modify the Notifications related to this task, e.g., you can arrange to be notified when the task is completed, or for the task assignee to be notified if the task is overdue

Completing or skipping a task

General History Advanced

Task: 14. Send comments to Contact Person

Description: Send the Consultants' comments to the Contact Person, and ask the Contact Person to prepare and submit a revised TRF.

Workflow: Title Registration

Manager: Jane Cracknell

Title: Classic laryngeal mask airway versus ProSeal laryngeal mask airway for positive-pressure ventilation in adults

Assigned To: Jane Cracknell (Editorial Base)

Status: In Progress Completed Skipped

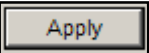
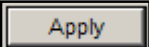
Started: 9 October, 2008

Due: 13/11/2008

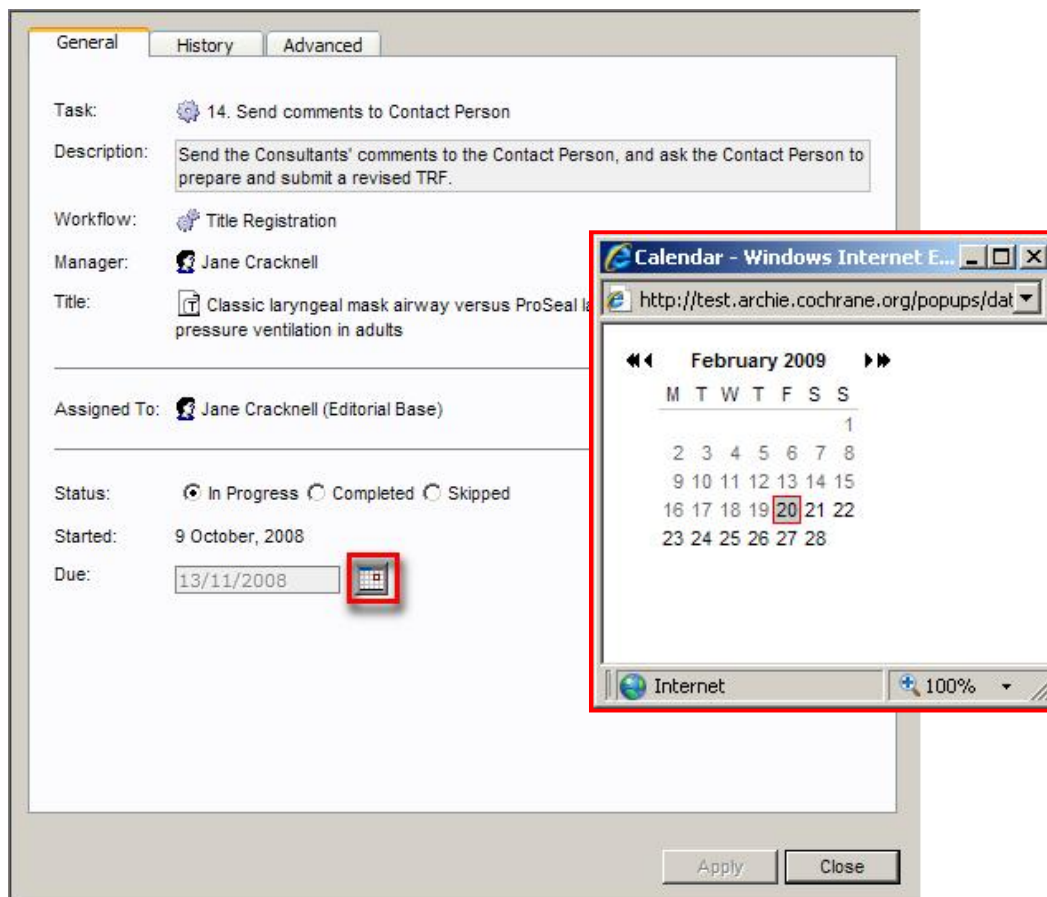
Decision: Consult with others? Yes No Clear



Status: In Progress Completed

Apply Close

- To complete a task, open the task Properties and go to the General tab
- If the task does not involve a decision, choose Completed or Skipped and click 
- If the task does involve a decision, choose from among the alternatives (e.g., Yes/No); Status will automatically change to Completed; click 

Changing the due date of a task



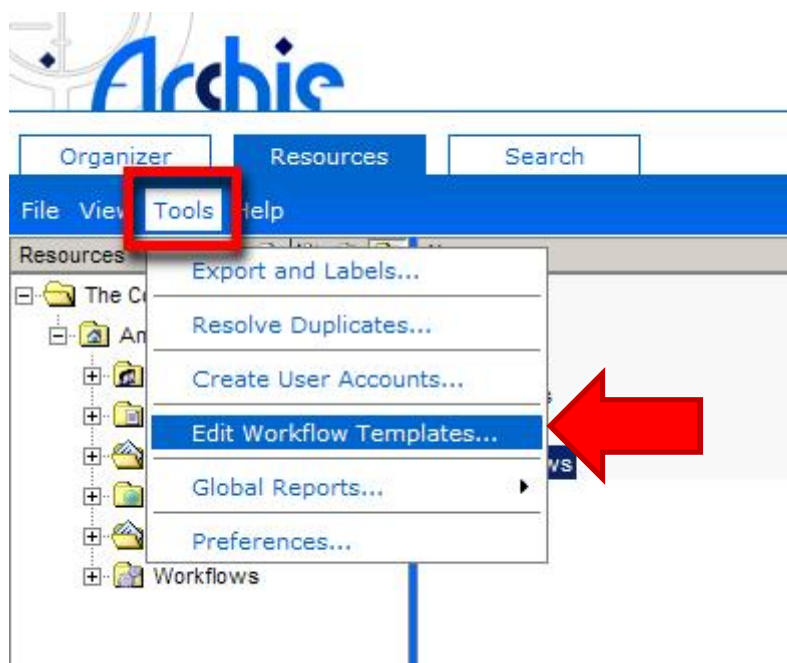
- To change the Due date, open the task's Properties and go to the General tab
- Click  to open the Calendar
- Choose the new Due date in the Calendar
- Click  to assign the new Due date



CUSTOMIZING WORKFLOW TEMPLATES FOR USE IN YOUR CRG

Editing a workflow template

All workflow templates contain default task lists and default task durations



To edit a template for use in your CRG, go to Tools > Edit Workflow Templates...

Editing a workflow template

Choose the template to be edited

Task	Duration	Skip
1 Decision: Topic appropriate and within CRG scope?	7	<input type="checkbox"/>
2 Decision: Significant overlap with other title(s)?	7	<input type="checkbox"/>
3 Request a completed Title Registration Form (TRF)	14	<input type="checkbox"/>
4 Complete and submit a Title Registration Form	14	<input type="checkbox"/>
5 Decision: TRF clear and complete?	3	<input type="checkbox"/>
<input checked="" type="checkbox"/> A - Draft TRF submitted for editorial approval		
6 Decision: Consult with others?	7	<input type="checkbox"/>
7 Identify Consultants	7	<input type="checkbox"/>
8 Make TRF available to Consultant	8	<input type="checkbox"/>
9 Review and comment on Title Registration Form	7	<input type="checkbox"/>
10 Decision: Comments clear and complete?	2	<input type="checkbox"/>
11 Send comments to Contact Editor	2	<input type="checkbox"/>

Click Edit to begin editing



Editing a workflow template

Name of new CRG-specific template shown

Task	Duration	Skip
1. Decision: Topic appropriate and within CRG scope?	1	<input type="checkbox"/>
2. Decision: Significant overlap with other title(s)?	1	<input checked="" type="checkbox"/>
3. Request a completed Title Registration Form (TRF)	1	<input type="checkbox"/>
4. Complete and submit a Title Registration Form	5	<input type="checkbox"/>
5. Decision: TRF clear and complete?	1	<input checked="" type="checkbox"/>
6. Decision: Consult with others?	1	<input checked="" type="checkbox"/>
7. Identify Consultants	5	<input type="checkbox"/>
8. Make TRF available to Consultant	1	<input type="checkbox"/>
9. Review and comment on Title Registration Form	7	<input type="checkbox"/>
10. Decision: Comments clear and complete?	1	<input checked="" type="checkbox"/>
11. Send comments to Contact Editor	1	<input type="checkbox"/>
12. Prepare comments for presentation to authors	3	<input type="checkbox"/>

Change the durations of individual tasks and mark tasks to be skipped

Click OK to finish



USING THE TICKETING SYSTEM

Advantages of the ticketing system

- Easy communication between editorial base and “outsiders” assigned specific tasks
- Provides task assignees with everything they need to complete their task and report back to the editorial base without logging into Archie
- Integrated into the workflow system – allows tracking of communication and automatic updating of information about tasks

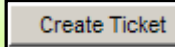


Creating a Ticket

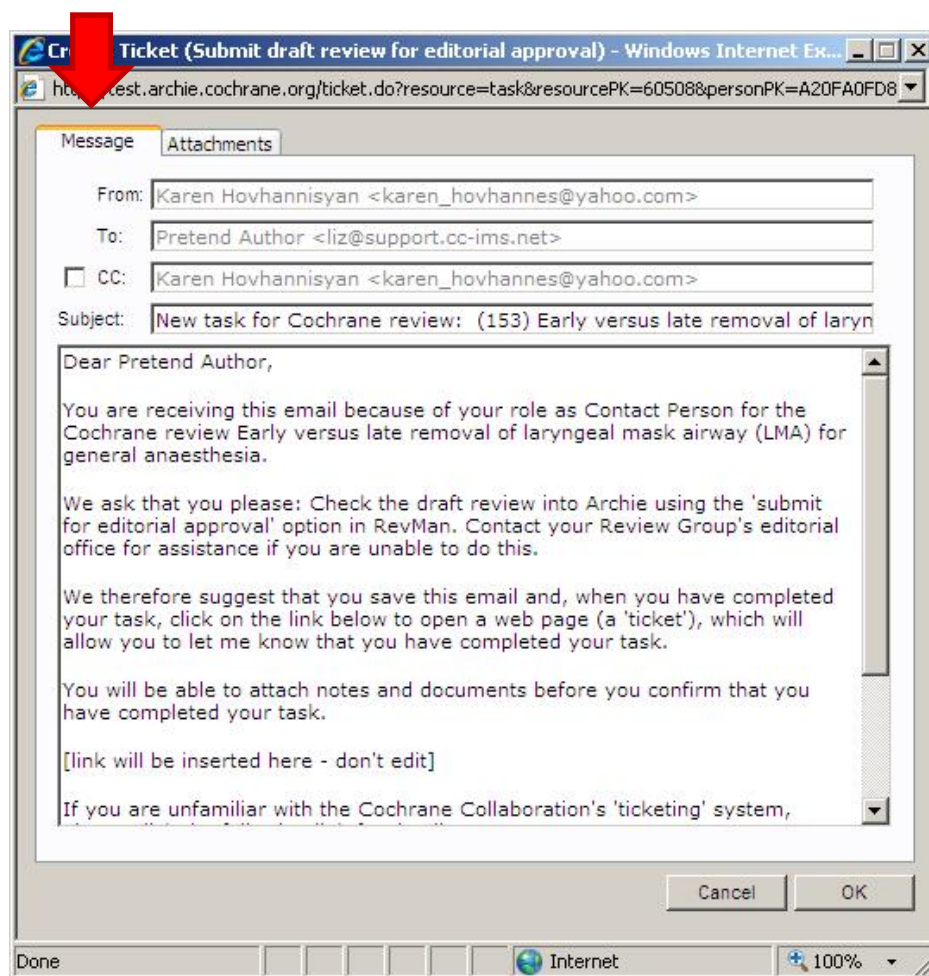


To create a Ticket open the task Properties and go to the Advanced tab

The screenshot shows a dialog box with three tabs: 'General', 'History', and 'Advanced'. The 'Advanced' tab is selected. It contains two sections: 'Email Ticket' and 'Notification'. The 'Email Ticket' section has a checkbox labeled 'Allows assignee to complete task without logging into Archie' and a 'Create Ticket' button. The 'Notification' section has a heading 'Check any of the items below to receive email notification when the specified event occurs.' and four checkboxes: 'Notify the manager when task begins' (checked), 'Notify the manager when task is complete' (unchecked), 'Notify the manager if task becomes overdue' (unchecked), and 'Notify the assignee when task begins' (checked). A red arrow points from the text box above to the 'Advanced' tab, and another red arrow points from a 'Click' callout box to the 'Create Ticket' button.

Click 

Creating a Ticket



There are two tabs in the Ticket window. The Message tab contains an editable message to the assignee.

On the Attachments tab it is possible to attach the review in the RM5 or PDF format or any other file from Archie Files folder or a local drive

Creating a Ticket

Tick "Attach a review version" to attach a copy of the review in RevMan or PDF (or both) formats

You can attach other files from your Files folder in Archie to the Ticket. Tick Archie file attachments to navigate to the Files folder in Archie

You can also attach files from your local drive. Click on Browse button to locate the file on local hard drive

Message Attachments

Review attachments

Attach a review version to the ticket

Version: 3.4 -

Format: RevMan PDF Both

Archie file attachments

Local file attachments

Cancel OK

Done Internet 100%

Click OK to send the Ticket

Receiving a Ticket

In your Mailbox you will receive an email with the subject “New task for Cochrane Review”



New task for Cochrane review: (169) Aerosolized prostacyclin for acute lung injury (ALI) and acute respiratory distress syndrome (ARDS) Inbox | X

★ Karen Hovhannisyan to me show details 5:37 PM (0 minutes ago) Reply | ▼

Dear Pretend Author,

You are receiving this email because of your role as Contact Person for the Cochrane review Aerosolized prostacyclin for acute lung injury (ALI) and acute respiratory distress syndrome (ARDS).

We ask that you please: Check the draft review into Archie using the 'submit for editorial approval' option in RevMan. Contact your Review Group's editorial office for assistance if you are unable to do this.

We would be very grateful if you could complete this task by 12 Jun, 2010. We therefore suggest that you save this email and, when you have completed your task, click on the link below to open a web page (a 'ticket'), which will allow you to let me know that you have completed your task.

For this task you will be able to attach a document before you confirm that you have completed your task.

<http://training.archie.cochrane.org/public/formTicket.jsp?key=CAD0FE2282E26A8501A330E448274F00&com=true>

If you are unfamiliar with the Cochrane Collaboration's 'ticketing' system, please click the following link for details: <http://training.archie.cochrane.org/public/ticket-explanation.html>
If you have any other questions, please let me know.

Best wishes,

Karen Hovhannisyan
Cochrane Anaesthesia Group

Aerosolized prostacyclin for acute lung injury (ALI) and acute respiratory distress syndrome (ARDS).pdf
174K [View](#) [Download](#)

[Reply](#) [Forward](#)

The ticketing email contains:
(a) a web link to the Ticket proper (used by the recipient to respond), and
(b) the files the Workflow Manager attached to the outgoing ticket






Receiving a Ticket



The web link in the email will open a page like this

Ticket

This ticket grants Karen Hovhannisyan access to the following task:

 Identify Sign-off Editor

Identify the person who will be responsible for formally approving the draft protocol before copy editing (e.g., the protocol's Contact Editor or the CRG's Co-ordinating Editor),

If you have comments to submit in relation to this task, you can upload them here.

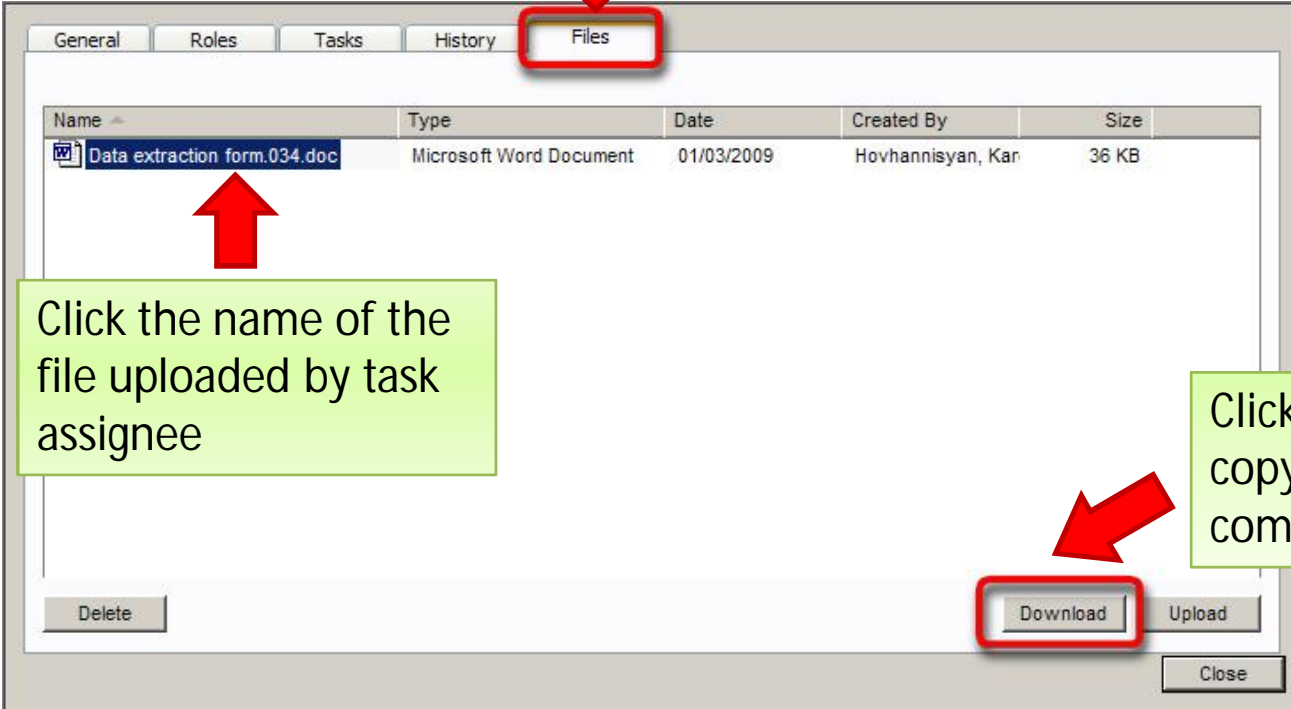
Locate file on your computer: No file chosen

Click to submit your files and mark the task as "Completed" in Archie

To submit comments or other input to the Workflow Manager, first save these as a file on your computer. Use to browse to the saved file.

Retrieving files sent by task assignee

To retrieve any files submitted with the completed task, open the workflow Properties and go to the Files tab



The screenshot shows a web application interface with a tabbed menu at the top containing 'General', 'Roles', 'Tasks', 'History', and 'Files'. The 'Files' tab is selected and highlighted with a red box and a red arrow pointing down. Below the tabs is a table with the following data:

Name	Type	Date	Created By	Size
Data extraction form.034.doc	Microsoft Word Document	01/03/2009	Hovhannisyanyan, Kar	36 KB

The file name 'Data extraction form.034.doc' is highlighted with a blue selection bar, and a red arrow points up to it. At the bottom of the interface, there are three buttons: 'Delete', 'Download', and 'Upload'. The 'Download' button is highlighted with a red box and a red arrow pointing to it from the right. A 'Close' button is also visible at the bottom right.

Click the name of the file uploaded by task assignee

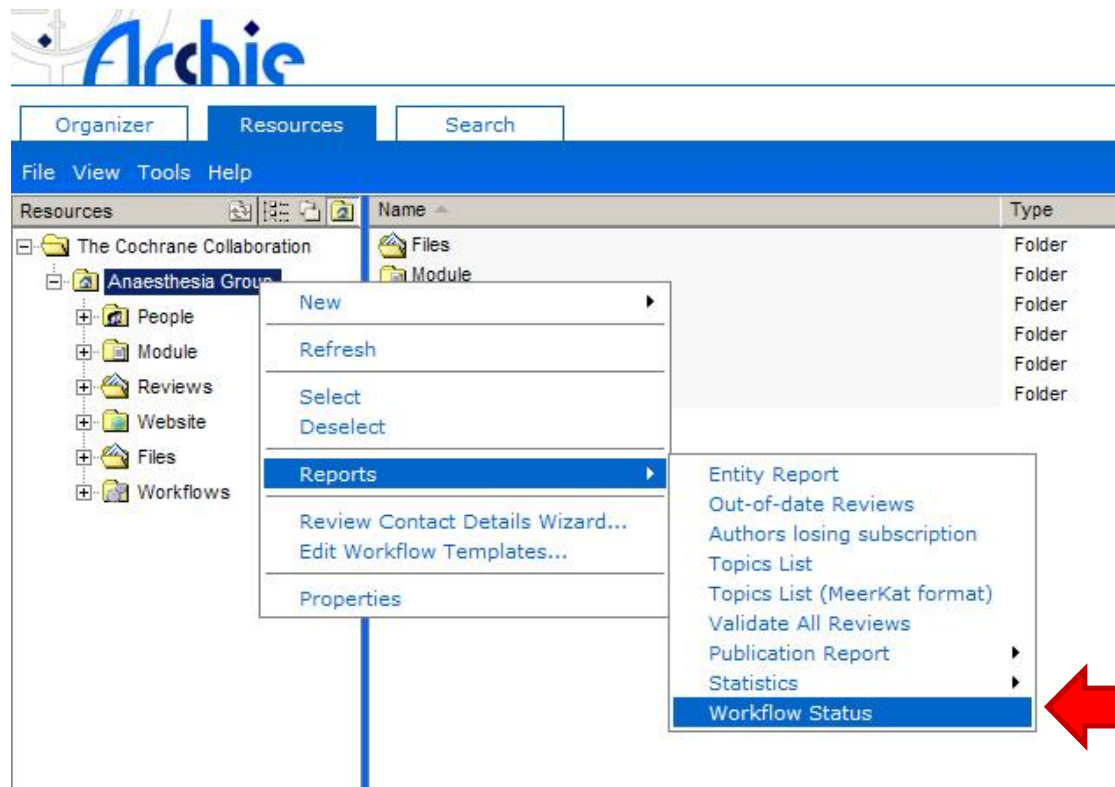
Click to save a copy of the file to your computer



USING THE WORKFLOW SYSTEM TO MONITOR PROGRESS AND PRIORITIZE WORK IN YOUR CRG

Available reports

In Archie you can generate reports that cover (potentially) all your CRG's workflows or reports about individual workflows



For information on the status of all workflows, right-click your CRG's name under Resources and choose Reports > Workflow Status

Workflow Status Report

Options within the Workflow Status Report allow you to select workflows by due date, workflow type, and Write Phase of review; various grouping and sorting options are also available. Click Update to generate report using the selected options.

Workflow Status

Anaesthesia Group, 21 Feb, 2009

Due date before:

Show workflows for:

Reviews in editorial phase
 All reviews

Group by:

Workflow type
 Review title

Sort tasks by:

Workflow types included:

Title Registration
 Protocol Development
 Review Development

Title Registration

Classic laryngeal mask airway versus ProSeal laryngeal mask airway for positive-pressure ventilation in adults

Workflow start date: 9 Oct, 2008. Workflow end/due date: 2 Dec, 2008.
Last milestone passed: None.

Task	Assigned To	Role	Start	Due	Duration	Left
14. Send comments to Contact Person	Jane Cracknell	Editorial Base	2008-10-09	2008-11-13	34	-99
15. Submit revised Title Registration Form	Muhammad Qamarul Hoda	Contact Person	2008-11-13	2008-11-27	14	-85
16. Decision: Does the revised TRF reflect comments?	Jane Cracknell	Editorial Base	2008-11-27	2008-11-28	1	-84
17. Decision: Transfer title to another CRG?	Jane Cracknell	Editorial Base	2008-11-28	2008-11-29	1	-83
18. Decision: Register title?	Jane Cracknell	Editorial Base	2008-11-29	2008-11-30	1	-82
20. Reject title	Jane Cracknell	Editorial Base	2008-11-30	2008-12-01	1	-81
19. Register title	Jane Cracknell	Editorial Base	2008-11-30	2008-12-01	1	-81
21. Notify Contact Person of non-registration	Jane Cracknell	Editorial Base	2008-12-01	2008-12-02	1	-80

Effect of alcohol intervention on postoperative complications in adults

Contact person: Oppedal, Kristian
Workflow start date: 22 Oct, 2008. Workflow end/due date: 12 Jan, 2009.
Last milestone passed: None.

Task	Assigned To	Role	Start	Due	Duration	Left
3. Request a completed Title Registration Form (TRF)	Jane Cracknell	Editorial Base	2008-10-22	2008-11-22	31	-90
4. Complete and submit a Title Registration Form	Kristian Oppedal	Contact Person	2008-11-22	2008-12-06	14	-76
5. Decision: TRF clear and complete?	Jane Cracknell	Editorial Base	2008-12-06	2008-12-07	1	-75
6. Decision: Consult with others?	Jane Cracknell	Editorial Base	2008-12-07	2008-12-08	1	-74

Individual Workflow Report



The screenshot shows the Archie software interface. On the left is a tree view under 'The Cochrane Collaboration' with 'Anaesthesia Group' expanded. The main window displays a table of workflows. A right-click context menu is open over the workflow 'Effect of alcohol intervention on postoperative complications', with the 'Reports > Workflow Report' option highlighted. A red arrow points from the text box on the right to this menu option.

Title	Rev No	Workflow
Not Started		
Catheter impregnation, coating or bonding for reducing ce	105	Review Development
Catheter impregnation, coating or bonding for reducing ce	105	Review Development
Closed tracheal suction systems versus open tracheal su	081	Review Development
Continuous interscalene blockade versus parenteral anal	054	Review Development
Cooling for cerebral protection for brain surgery	141	Review Development
Intra-operative warming for prevention of operative comp	183	Protocol Development
In Progress		
Adjunctive Hyperbaric oxygen for necrotizing fasciitis	133	Protocol Development
Central venous catheter (CVC) removal for adult patients	185	Protocol Development
Classic laryngeal mask airway versus ProSeal laryngeal		Title Registration
Cooling for cerebral protection for brain surgery	141	Protocol Development
De-escalation of antibiotic treatment for sepsis, severe s	179	Protocol Development
Effect of alcohol intervention on postoperative complic		Registration
Efficiency and safety of a continuous perioperative lido		Registration
Ethyl Chloride and other vapocoolants for pain treatme		Protocol Development
Exercise rehabilitation for recovery from critical illness		Protocol Development
General versus regional anaesthesia for cognitive dys		Registration
General versus regional anaesthesia for changes of hu		Registration
Immunotherapy for food allergy		Registration
Intensive insulin therapy and strict glucose control for		Registration
Interventions for improving intubating conditions during di		Title Registration

To view a report on an individual workflow, right-click the name of the workflow in your CRG's Workflows folder and choose Reports > Workflow Report

Individual Workflow Report

Workflow Report

Due date before: 15/03/2009 19:23

Sort tasks by: Start

Filter tasks: Show completed tasks only

Enable History

Update

General Information

Title: Classic laryngeal mask airway versus ProSeal ventilation in adults

Workflow: Title Registration (version 1.1)

Review No: -

Manager: Jane Cracknell

Status: In Progress

Start: 9 Oct, 2008

End: 2 Dec, 2008

Workflow Roles

Consultant: Jane Cracknell

Editorial Base: Jane Cracknell

Contact Person: Muhammad Qamarul Hoda

Contact Editor: Jane Cracknell

Tasks

Task	Assigned To	Role	Start	Due	Duration	Left
1. Decision: Topic appropriate and within CRG scope?	Jane Cracknell	Editorial Base	2008-10-09	2008-10-09	0	-143
2. Decision: Significant overlap with other title (s)?	Jane Cracknell	Editorial Base	2008-10-09	2008-10-09	0	-143

Options within the individual Workflow Report allow you to select tasks by due date and to sort and filter tasks in various ways

Notifications

Task-specific notifications

As Workflow Manager, you can arrange for notifications regarding an individual task to be sent to you or the task assignee by email – e.g., to notify you when the task is complete or to notify the assignee when the task is overdue

To activate these notifications open the task Properties and go to the Advanced tab

Check the notifications you wish to activate

Click Apply to activate the notifications

General History **Advanced**

Email Ticket
Allows assignee to complete task without logging in

Create Ticket

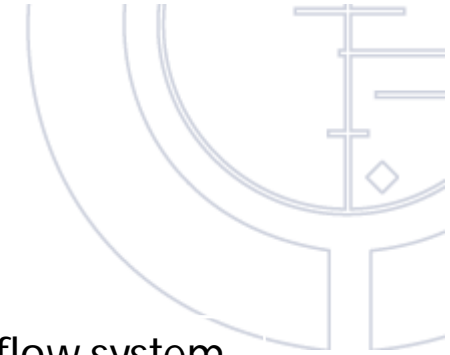
Notification
Check any of the items below to receive email notification when the specified event occurs.

- Notify the *manager* when task begins
- Notify the *manager* when task is complete
- Notify the *manager* if task becomes overdue
- Notify the *assignee* when task begins
- Notify the *assignee* if task becomes overdue

Upload file **Apply** Close

Notifications

More general notifications



There are also new general notifications options related to the workflow system

General Info Roles 10 Settings Notes 1

User account

User name: karenH
Last login: Today, 1 March, 2009, 21:33

Edit User Account...

Privacy

Hide Email addresses Hide Mobile phone

Bulk mailings

Accepted: From primary entity only

Notifications

Edit Notifications...

Close

To edit your personal Notifications, open your Properties, go to the Settings tab, and click Edit Notifications

Notifications

More general notifications



Check the boxes of the Notifications you want to receive, e.g., to be notified when a task assigned to you becomes active or overdue

Choose whether you wish to receive the selected Notifications via Archie's messaging system or via your email

Events

Notify Karen Hovhannisyian when:

- Karen Hovhannisyian's record is modified
- A task assigned to Karen Hovhannisyian becomes active
- A task assigned to Karen Hovhannisyian becomes overdue
- Changes are suggested to a member of the Anaesthesia Group

Send messages via:

- Email to karen.hovhannisyian@gmail.com
- Archie messaging system
- Email to karen.hovhannisyian@gmail.com
- Archie messaging system
- Email to karen.hovhannisyian@gmail.com
- Archie messaging system
- Email to karen.hovhannisyian@gmail.com

Cancel OK


Click OK to activate the Notifications

Advanced Search options: workflows

To search for Workflows go to the Advanced Search tab and choose Workflows

The screenshot shows the Archie web application interface. At the top, there are tabs for 'Organizer', 'Resources', and 'Search'. A red arrow points to the 'Search' tab. Below the tabs is a 'Quick Search' input field and a 'Search' button. A green callout box points to this 'Search' button with the text 'Click [Search] to initiate the search'. Below the search bar, there are radio buttons for 'People', 'Documents', 'Entities', 'Workflows', and 'Tasks'. The 'Workflows' radio button is selected. A red arrow points to this radio button with the text 'Click the [person icon] button to choose the person to search'. Below the radio buttons is a search criteria field with a dropdown menu. The dropdown menu is open, showing options: 'Start', 'End or Due', 'Manager', 'History', 'Entity', and 'Workflow'. A red arrow points to the 'Manager' option with the text 'Workflows can be searched by Workflow Manager, History, etc.'. To the right of the search criteria field is another 'Search' button, which is highlighted with a red box. Below the search criteria field are buttons for 'More rows', 'Fewer rows', 'Reset', and 'My Searches...'. A red arrow points to the 'More rows' button with the text 'You can add more rows to make the search more precise'. At the top right of the interface, there is a 'TEST SERVER' warning: 'FOR TEST PURPOSES ONLY EXPECT ERRORS AND ODD BEHAVIOUR'. The user's name 'Karen Hovhannis' is visible in the top right corner.

Click **Search** to initiate the search

Click the  button to choose the person to search

Workflows can be searched by Workflow Manager, History, etc.

You can add more rows to make the search more precise

Advanced Search options: tasks

To search for Tasks go to the Advanced Search tab and choose Tasks

The screenshot shows the Archie web application interface. At the top, there is a navigation bar with tabs for 'Organizer', 'Resources', 'Search', 'Publisher', and 'Admin'. The 'Search' tab is highlighted. Below this is a blue header with 'File Tools Help' and a user profile for 'Karen Hovhan, Anaesthesia'. The main content area has tabs for 'Quick', 'Advanced', 'Results', and 'Selection'. Under 'Advanced Search', there are radio buttons for 'People', 'Documents', 'Entities', 'Workflows', and 'Tasks', with 'Tasks' selected. A search criteria field shows '1 Assigned To is [input field]'. A dropdown menu is open for 'Assigned To', listing options like 'Start', 'End or Due', 'Days Left', 'Is Overdue', 'Task Name', 'Status', 'Assigned To', 'Manager', 'History', 'Entity', and 'Workflow'. To the right, there is a 'Search' button and radio buttons for 'Match all rows (AND)' and 'Match any row (OR)'. At the bottom, there are buttons for 'More rows', 'Fewer rows', 'Reset', and 'My Searches...'.

Tasks can be searched by assignee, start or end/due dates, task name, etc.

Where to get support



If you have any questions or encounter any problems using the workflow system, please contact your IMS Support person