Publishing with Publish When Ready: practice exercises for Managing Editors

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This document provides basic information and practice exercises for Managing Editors (MEs) who would like some hands-on experience with the new Publish When Ready (PWR) functionality in Archie. The exercises are designed to be performed on the Archie Training server (training.archie.cochrane.org). You should be able to log in to this server using your regular Archie user name and password. The exercises have been adapted from testing scripts prepared by the IMS team.

Contents

1. Before you start these exercises

Before you start these exercises, please ensure that you read the PWR resource available at ims.cochrane.org/support/crgs/publication-frequency. For more detailed information on the functionality described below, please also consult the online Archie Help file (Help > Archie Help) on the live or Training server.

The Training server has been set up by the IMS team to mimic the production process through to publication in the *Cochrane Database of Systematic Reviews* (*CDSR*). This means that you can progress in the exercises all the way through to (simulated) publication, see accurate information on Reports, and receive the appropriate Notifications. Use of the Training server does, however, impose some limitations. The most important of these are (a) that you will need to complete Licence for Publication (LfP) forms on behalf of authors, and (b) that the Notifications you elect to receive will all be delivered via the Training server's messaging system, rather than by email. The live Archie server will include an email option for the Notifications.

We have tried to keep the exercise details brief to allow you to follow your intuition on the use of the system. Please contact ME Support (mesupport@cochrane.org) if you have any questions or would like a demo of any of the functionality described below.

Terminological note: For the sake of brevity, 'review' (lower case) is used in this document to refer to a Protocol, Full Review, or Updated Review.

2. New Archie features implemented to facilitate PWR

2.1. New Notifications

There are four new Archie Notifications (Table 1). You will need to select these within your personal Properties (Settings tab: Edit Notifications…). As noted above, in the Training server, the Notifications you elect to receive will all be delivered via the Training server's messaging system, rather than by email. On the live Archie server, Notifications can also be received by email.

Table 1. New Archie Notifications

Notification	Details
a. Review publication is delayed because of missing LfP forms in the xxx CRG	Applies to all Protocols, Full Reviews, and Updates in the user's CRG. Indicates that publication of a review has been delayed beyond the specified delivery date/time because one or more LfP forms have not been completed. *Sample Notification:* Subject: Full Review publication delayed: Airway clearance techniques for bronchiectasis Body text: The Full Review 'Airway clearance techniques for bronchiectasis' (CLR-BRO) set to be delivered on 25/04/2013 22:15 GMT was withheld from publication because of missing Licence for Publication forms.

Notification	Details
b. Reviews (any stage/status) in the xxx CRG are published	Applies to all Protocols, Full Reviews, and Updates in the user's CRG. Indicates when a review is published in the *CDSR*, and provides basic information on the review's status. *Sample Notification:* Subject: Full Review published: Clinical pathways for chronic cough in children Body text: The Full Review 'Clinical pathways for chronic cough in children' (PATH-OTH) was published on 25/04/2013 23:58 GMT in the *Cochrane Database of Systematic Reviews*, Issue 4, 2013, with the status Updated and Conclusions Changed (new citation).
c. A new protocol is published	Used for new Protocols. Indicates when a new Protocol ***from any CRG*** is published in the *CDSR*. *Sample Notification:* Subject: New protocol published: Allograft versus autograft for reconstruction of anterior cruciate ligament ruptures in adults Body text: The new protocol 'Allograft versus autograft for reconstruction of anterior cruciate ligament ruptures in adults' (Bone, Joint and Muscle Trauma Group, 10.1002/14651858.CD010537) was published on 13/05/2013 13:11 GMT in the *Cochrane Database of Systematic Reviews*, Issue 6, 2013.
d. A new review is published	Used for new Full Reviews. Indicates when a new Full Review ***from any CRG*** is published in the *CDSR*. *Sample Notification:* Subject: New review published: Supraglottic airway devices versus tracheal intubation for airway management during general anaesthesia in obese patients Body text: The new review 'Supraglottic airway devices versus tracheal intubation for airway management during general anaesthesia in obese patients' (Anaesthesia Group, 10.1002/14651858.CD010105.pub2) was published on 13/05/2013 13:11 GMT in the *Cochrane Database of Systematic Review*, Issue 6, 2013.

2.2. Publication Pipeline Report

A new Report (Publication Pipeline) has been implemented for PWR. Right-click your CRG's name and choose Reports > Publication Report > Publication Pipeline (*see* Figure 1 for an example). Note that "Withheld from delivery" in this Report refers to reviews whose publication has been delayed because of missing LfP forms.

Figure 1. Sample Publication Pipeline report

2.3. New fields in Review Versions search (Advanced Search)

New search fields have been added to the Review Versions search (Advanced Search; *see* Figure 2):

- *Delivery Date*—date when Archie should deliver the review to Wiley for publication (selected on the Publication Wizard)
- *Date Delivered*—date when the review was actually delivered to/picked up by Wiley
- *Date Published*—date when the review was published in the *CDSR*

Figure 2. New fields in Review Versions search (Advanced Search)
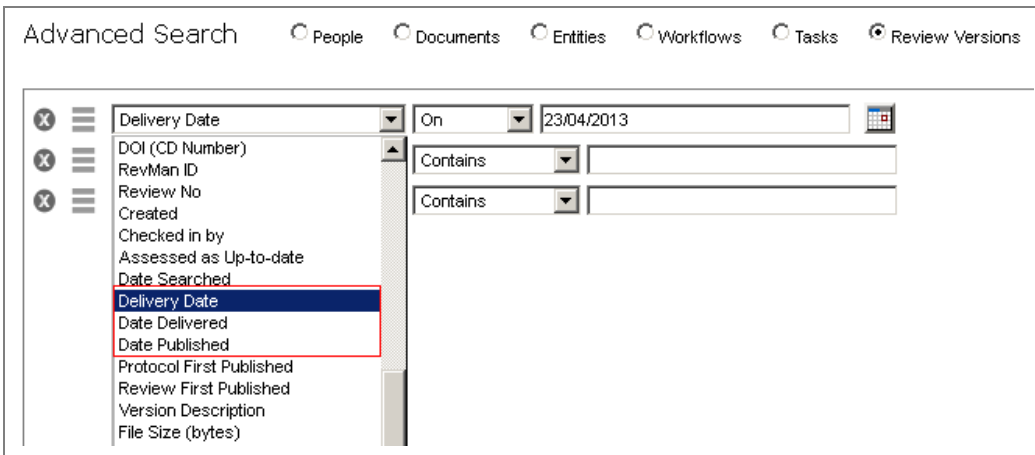
3. Practice scenarios

To begin: select Notifications a and b, described above (Table 1),along with c and d, if you wish.

You may need to do some editing in RevMan for some of the exercises. If so, check that RevMan is connected to the Training server (training.archie.cochrane.org) (RevMan > Tools > Preferences > Connection tab). *Remember to set the connection back to the live Archie server (archie.cochrane.org) after you finish.*

Scenario 1: Immediate publication

In this scenario you will practice immediate publication of a review. Important: When publishing under this scenario, do not change the date under 'Specify the date and time when Archie should deliver the Protocol/Review for publication' in the Publication Wizard (*see* Figure 3 below). Complete Exercise 1 for this scenario.

Figure 3. Specifying the delivery date and time in the Publication Wizard

Exercise 1. Immediate publication

Steps	Expected result
1. Choose a new Protocol, new Full Review, or Updated Review that is ready for publication.	–
2. Run the Publication Wizard. Remember not to change the default delivery date and time in the Wizard (Figure 3).	The Publication Status icon on the Resources page should be a **red** half-circle.
3. Complete the LfP forms on behalf of the authors to progress the review to delivery for publication. (Click review title under Resources, choose Reports > Licence for Publication Forms, then click Open and complete the form for each author.)	The Publication Status icon on the Resources page should change to a **blue** half-circle.
4. Check the status of the review after the specified delivery date and time have passed (default is 2 hours from the time you run the Publication Wizard; it may take an additional 15 minutes for 'Wiley' to accept delivery of the review).	The Publication Status icon on the Resources page should change to a full **black** circle. If you have subscribed to Notification b, above, you should receive a Notification that the review has been published via the Training server's messaging system. ***From the time you run the Publication Wizard (Step 2) through to publication (Step 4),*** you should be able to track the progress of the review in the three Publication Reports: • Summary • Detailed • Publication Pipeline You should also be able to track progress using the Advanced Search options for Review Versions described above.

Scenario 2: Cancelling publication ('Undo Publish')

In this scenario, you will mark a review for publication and, within two hours, cancel the publication. Try Exercise 2 to cancel publication.

Note: When practicing this scenario, please do not change the date under 'Specify the date and time when Archie should deliver the Protocol/Review for publication' in the Publication Wizard (Figure 3). Please note, however, that you can cancel publication at any time after running the Publication Wizard and before the specified Delivery date/time.

Tip: When cancelling publication 'live', remember that—as in the old publication system—'Undo Publish' deletes all completed LfP forms. Another option (as before) is simply to republish the review (without 'undoing' publication first) before the scheduled delivery date/time. This will preserve the completed LfP forms. You can also use Change Delivery Date (*see* Exercise 4) if this is appropriate.

Exercise 2. Cancelling publication

Steps	Expected result
1. Choose a new Protocol, new Full Review, or Updated Review that is ready for publication.	—
2. Run the Publication Wizard. Remember not to change the default delivery date and time in the Wizard (Figure 3).	The Publication Status icon on the Resources page should be a **red** half-circle.
3. Complete the LfP forms on behalf of the authors to progress the review to delivery for publication. (Click review title under Resources, choose Reports > Licence for Publication Forms, then click Open and complete the form for each author.)	The Publication Status icon on the Resources page should change to a **blue** half-circle. The review should appear (under 'Pending delivery date') in the three Publication Reports: • Summary • Detailed • Publication Pipeline
4. Undo publication within two hours, before the review is delivered to 'Wiley' for publication (right-click review title and choose Undo Publish).	All completed LfP forms should be deleted. The review should not appear in any of the three Publication Reports: • Summary • Detailed • Publication Pipeline Report No Notifications should be received.

Scenario 3: Specifying a delivery date and time

In this scenario you will practice setting the date and time when the review will be delivered to Wiley for publication. For the exercises, you will be using two reviews. You should mark both reviews for publication and specify the delivery date/time.

For the first review, you will then complete all LfP forms on behalf of the authors; *see* Exercise 3. For the second review, you will let the delivery date/time pass, change the delivery date/time, and only then complete the LfP forms on behalf of the authors; *see* Exercise 4.

Exercise 3. Specifying a delivery date/time AND LfP forms completed in time

Steps	Expected result
1. Choose a new Protocol, new Full Review, or Updated Review that is ready for publication.	—
2. Run the Publication Wizard. Under 'Specify the date and time when Archie should deliver the review for publication' (Figure 3), **change the delivery date/time** to one hour later than the default (click in the date-time field and use the pop-up calendar, etc. to adjust).	The Publication Status icon on the Resources page should be a **red** half-circle.
3. Complete the LfP forms on behalf of the authors to progress the review to delivery for publication. (Click review title under Resources, choose Reports > Licence for Publication Forms, then click Open and complete the form for each author.)	The Publication Status icon on the Resources page should change to a **blue** half-circle.
4. Check the status of the review after the specified delivery date and time have passed (plus an additional 15 minutes for 'Wiley' to accept delivery of the review).	The Publication Status icon on the Resources page should change to a full **black** circle. If you have subscribed to Notification b, above, you should receive a Notification that the review has been published via the Training server's messaging system. ***From the time you run the Publication Wizard (Step 2) through to publication (Step 4),*** you should be able to track the progress of the review in the three Publication Reports: ● Summary ● Detailed ● Publication Pipeline

	You should also be able to track progress using the Advanced Search options for Review Versions described above.

Exercise 4. Specifying a delivery date/time AND LfP forms not completed in time

Steps	Expected result
1. Choose a new Protocol, new Full Review, or Updated Review that is ready for publication.	—
2. Run the Publication Wizard. Under 'Specify the date and time when Archie should deliver the review for publication' (Figure 3), **change the delivery date/time** to one hour later than the default (click in the date/time field and use the pop-up calendar, etc., to adjust).	The Publication Status icon on the Resources page should be a **red** half-circle.
3. Do **not** complete all LfP forms.	The Publication Status icon on the Resources page should remain a **red** half-circle.
4. Allow the specified delivery date/time to pass.	If you have subscribed to Notification a, above, you should receive a Notification (via the Training server's messaging system) that publication has been delayed because of missing LfP forms. The Publication Status icon on the Resources page should remain a **red** half-circle.
5. Change the delivery date/time to a later date/time (right-click the review title and choose Change Delivery Date …).	The Publication Status icon on the Resources page should remain a **red** half-circle.
6. Complete the LfP forms on behalf of the authors to progress the review to delivery for publication. (Click review title under Resources, choose Reports > Licence for Publication Forms, then click Open and complete the form for each author.)	The Publication Status icon on the Resources page should change to a **blue** half-circle.
7. Check the status of the review after the specified delivery date and time have passed (plus an additional 15 minutes for 'Wiley' to accept delivery of the review).	The Publication Status icon on the Resources page should change to a full **black** circle. If you have subscribed to Notification b, above, you should receive a Notification that the review has been published via the Training server's messaging system. *From the time you run the Publication Wizard*

Steps	Expected result
	(Step 2) through to publication (Step 7), you should be able to track the progress of the review in the three Publication Reports: • Summary • Detailed • Publication Pipeline You should also be able to track progress using the Advanced Search options for Review Versions described above.

Scenario 4: Publishing a new and an amended version of the same review in a single issue of the *CDSR*

In this scenario you will practice publishing Review Amendments; *see* Exercise 5. You can use the review(s) you worked on in Scenario 1 in order to skip steps 1 and 2.

Exercise 5. Publishing a new review and an amendment in the same Issue

Steps	Expected result
1. Choose a new Protocol, new Full Review, or Updated Review that is ready for publication.	–
2. Run the Publication Wizard. Do **not** change the default delivery date and time in the Wizard (Figure 3).	The Publication Status icon on the Resources page should be a **red** half-circle.
3. Complete the LfP forms on behalf of the authors to progress the review to delivery for publication. (Click review title under Resources, choose Reports > Licence for Publication Forms, then click Open and complete the form for each author.)	The Publication Status icon on the Resources page should change to a **blue** half-circle.
4. Check the status of the review approximately 15 minutes after the specified delivery date and time have passed.	The Publication Status icon on the Resources page should change to a full **black** circle. If you have subscribed to Notification b, above, you should receive a Notification that the Protocol has been published via the Training server's messaging system. *From the time you run the Publication Wizard (Step 2) through to publication (Step 4),* you should be able to track the progress of the

Steps	Expected result
	Protocol in the three Publication Reports: • Summary • Detailed • Publication Pipeline You should also be able to track progress using the Advanced Search options for Review Versions described above.
5. Check the review out to RevMan and add an 'Amended' What's new Event. Check back into the Training server.	—
6. Repeat Steps 2–4, above.	If you have subscribed to Notification b, above, you should receive a Notification that the amended review has been published via the Training server's messaging system. ***From the time you run the Publication Wizard through to publication the second time around,*** you should be able to track the progress of the amended review in the three Publication Reports: • Summary • Detailed • Publication Pipeline You should also be able to track progress using the Advanced Search options for Review Versions described above.

Scenario 5: Publishing a review as Withdrawn

In this scenario you will practice withdrawing a review from publication; *see* Exercise 6.

Exercise 6. Publishing a review as Withdrawn

Steps	Expected result
1. Follow the usual steps to prepare for withdrawal: Check out a published review Add a Published note giving the reason for withdrawal Add an 'Amended' What's new Event Check back in to the Training server Change Status to Withdrawn (Advanced tab of the review's Properties)	—
2. Run the Publication Wizard. Do **not** change the default delivery date and time in the Wizard (Figure 3). No LfP forms are required.	The Publication Status icon on the Resources page should be a **blue** half-circle.
3. Check the status of the review approximately 15 minutes after the specified delivery date and time have passed.	The Publication Status icon on the Resources page should change to a full **black** circle. If you have subscribed to Notification b, above, you should receive a Notification that the withdrawn review has been published via the Training server's messaging system. ***From the time you run the Publication Wizard (Step 2) through to publication (Step 3),*** you should be able to track the progress of the withdrawn review in the three Publication Reports: • Summary • Detailed • Publication Pipeline You should also be able to track progress using the Advanced Search options for Review Versions described above.