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 (<u>training.archie.cochrane.org</u>). 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.

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I. Before you start these exercises

Before you start these exercises, please ensure that you read the PWR resource available at <u>ims.cochrane.org/support/crgs/publication-frequency</u>. 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 (<u>mesupport@cochrane.org</u>) 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.

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.

Table I. New Archie Notifications

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 <i>CDSR</i> , 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 <i>Cochrane Database of Systematic Reviews</i> , 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 <i>from any CRG</i> is published in the <i>CDSR</i> .
	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, <u>10.1002/14651858.CD010537</u>) was published on 13/05/2013 13:11 GMT in the <i>Cochrane Database of</i> <i>Systematic Reviews</i> , Issue 6, 2013.
d. A new review is published	Used for new Full Reviews. Indicates when a new Full Review <i>from any CRG</i> is published in the <i>CDSR</i> .
	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, <u>10.1002/14651858.CD010105.pub2</u>) was published on 13/05/2013 13:11 GMT in the <i>Cochrane Database of Systematic Review</i> , 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 I. Sample	Publication	Pipeline report
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						0	Contents			
No case - subd decr							0122242271			
Publication Pipeline Anways Group, 08/05/2013 10:50										
Group by Status										
Title	Version	001	Stege	Publication Flag	New Citation	Delivery Date -	Date Delivered	Date Published	Inum 2	
E 8 - Withbeid from delivery 2										1
Gastro-oesophageal reflux treatment for as	5.0	CD001496	Full Review	Condusions Ch	Yes	23/04/2013 21:45			4.2013	1
Addition of long-acting beta2-agonists to in		C0005535 pt	Full Review	Updated and C	Yes	23/04/2013 23:11			4, 2013	1
= D - To be published 1										ľ
Fluticasone at different doses for divonio at	15.0	C0003534 pv	Full Review	Updated	Yes-	02/05/2013 17:01	03/05/2013 10:11	1	6, 2013	
E - Published within last 20 days 29										1
Airway dearance techniques for bronchied	2.0	CD008361 pr	Full Review	New	Yes	23/04/2013 16 50		23/04/2013 15:50	4, 2013	1
Airway clearance techniques for bronchied	3.0	CD008351.pi	Full Review	Amended	No	23/04/2013 20:51		23/04/2013 21:01	4.2013	
Addition of anti-leukotriene agents to inihal	11.0	CD003133.p.	Full Review	Stable	No	23/04/2013 22:21		24/04/2013 11:55	4, 2013	
Long-acting therapy for chronic obstructive	2.0	CD010178	Protocol	Amended	No	24/04/2013 16:4/	24/04/2013 16:4:	24/04/2013 17:11	4, 2013	L.
Selety of regular formateral or salmeteral i	3.0	CD010005.p.	Full Review	Stable	No	24/04/2013 16:50	24/04/2013 17:0	24/04/2013 17:51	4, 2013	
Gelectomannen detection for invasive sap-	3.0	CD007394	Full Review	Updated	No	24/04/2013 17:10	24/04/2013 17:31	25/04/2013 04:57	4, 2013	
Combined inhaled beta-agonial and antich	7.0	CD001284	Protocol	Amended	No	24/04/2013 17:31	24/04/2013 17:4	24/04/2013 18:11	4, 2013	
Addition of long-acting bets2-agonists to If	7.0	CD005307 pt	Full Review	Amended	No	24/04/2013 18:08	24/04/2013 18:11	24/04/2013 18:41	4, 2013	
Antibiotics for pensistent cough or wheese f		C0009834 pi	Full Review	Amended	No	24/04/2013 18:20	24/04/2013 18:31	24/04/2013 19:21	4, 2013	
Non-invasive ventilation during exercise try	2.0	CC007714.pc	Protocol	Major Change	Ves	25/04/2013 12:51	25/04/2019 21:4	26/04/2013 22:11	4, 2010	
Yoga for asthma	2.0	CD010346 pt	Protocol	Amended	Yes	25/04/2013 13:11	25/04/2019 13:11	25/04/2013 13:45	4, 2013	
Anti-leukobiene agents compared to inhale	6.0	CD002314.p.	Full Review	Amended	Yes	25/04/2013 13:38	03/05/2013 12:30	08/05/2013 17:31	6, 2013	
Airway dearance techniques for bronchied		CD008351.pi	Full Review	Conclusions Ch	Ves	20/04/2013 00:18	29/04/2013 10:31	29/04/2013 11:18	4, 2013	
Clinical pethways for chronic cough in shill		C0006555 m	E.C. Review	Updated and C	Yes	25/04/2013 01:11	25/04/2013 01:11	26/64/2013 01:51	4 2513	5

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

Advano	ced Search	C People	C Documents	C Entities	C Workflows	C _{Tasks}	• Review Versions
	Delivery Date DOI (CD Number) RevMan ID Review No Created Checked in by Assessed as Up-to-da Date Searched Date Delivered Date Delivered Date Published Protocol First Published Review First Published Version Description File Size (bytes)	d	On Contains Contains	 23/04/2013 23/04/2013 	3		

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 (<u>training.archie.cochrane.org</u>) (RevMan > Tools > Preferences > Connection tab). *Remember to set the connection back to the live Archie server (archie.cochrane.org) after you finish.*

Scenario I: 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.

test.archie.cochrane.org/wite	vdr(publishReviews) pp/Rey-90014631964076599967101215101742
ublication Wizard	
Specify the date and t	ime when Archie should deliver the protocol for publication:
29/05/2013 18:31	GMT-4, in Issue 7, 2013
possible you should keep Note: Archie will not deli completed regardless of	is 2 hours from now, which is the default. If you want to publish as soon as the default time. were the protocol for publication until al Licence for publication forms have been the time specified above. If the specified time has passed and some forms are still be released as soon as the last form is submitted.
	on. Archie every 15 minutes. It may take up to 2 hours from a review is collected

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

Exercise I. 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.

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.

Exercise 2. Cancelling publication

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.

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

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

the	u should also be able to track progress using e Advanced Search options for Review rsions described above.
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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.

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. <i>From the time you run the Publication Wizard</i> <i>(Step 2) through to publication (Step 4),</i> you should be able to track the progress of the

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

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

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The Publication Status icon on the Resources page should be a blue half-circle.
 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
p Tp If Yw T F (S S N R