SharePoint as a digital collaborative tool for PREP Subspecialty Team members, including Product Managers, Operations Specialists, Online Specialists, Medical Copy Editors, and Editorial Board Members

PREP & SharePoint

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Subspecialty Workflow and SharePoint Proposal

Assumptions

For the 2013-2014 fiscal year, staff for the PREP Subspecialty products will include the following:

- 2 Product Managers
- 2 In-house copy editors (both of whom work concomitantly with journals)
- 2 Freelance copy editors (only one of whom can staff live peer review)
- 1 Operations Specialist
- 1 PREP Information Specialist
- 1 Senior Managing Editor

Critical Success Factors

A digital collaborative tool for the PREP Subspecialties will do the following:

- Require no additional costs
- Require no additional external contracts
- Require no additional staff
- Eliminate need for FTPs—recently corrupted, not backed up or supported by IT, not used or preferred by many volunteers, not Mac-compatible (Safari issues)
- Promote collaboration between PREP team members
- Integrate with existing systems as well as dovetail with the Academy-wide goals of IT
- Promote higher-level software training for PREP team members
- Cut costs for the 2013-2014 budget
- Increase internal control of process and production
- Lend well to process-based QI
- Take full advantage of existing technologies
- Operate within the technological proficiencies of our volunteers while providing a more approachable U/I than existing systems
- Provide a flexible framework to both accommodate the needs of our volunteers and provide growth potential in terms of process and software integration
- Allow product managers and other PREP team members to retain professional and creative autonomy while also minimizing menial tasks, thereby allowing employees to focus more on the elements of their job description that require intensive critical thinking

Perceived Challenges

Microsoft Security Updates—have been known to affect check-in and check-out features on SharePoint; however, this is considered a level II support problem that can be directed to C Gomez.

Browser support—demonstration with J Faletti was done on the Safari browser without issue. As a Microsoft product, Internet Explorer also presents no issues integrating with SharePoint. However, snags have been seen with external users and Firefox and Google Chrome. Internet Explorer is the only browser that provides an "Open with Explorer" feature. The feature allows those with administrative rights to move content between folders while bypassing check-ins and check-outs. Browser supports issues are predicted to be mitigated with further versions of SharePoint (i.e., 2013).

Support—how do we train editors and freelancers (ie, external users with read-write privileges) to use the site? How do we proceed with internal training? How will we assign primary points of contact for support? The Academy has already paid for external trainers to come to the AAP and provide 2-day, intensive training on SharePoint Foundation.

New Processes—For any group's current process, how do we present a new standardization to volunteers? Do we approach only the editors or all the volunteers at once? Would it be better to discuss changes with the editors of all 10 subspecialties, consequently creating champions for the site.

Provisions & Further Discussion

- Contact information (with privileges) listed and delivered to SharePoint developer (C Gomez)
- Establish workflow and process before approaching IT (per advice from Alain Park, who originally spearheaded the SharePoint site for *Grand Rounds*)
- Setting up server with SharePoint developer
- Online workflow design (i.e., how the libraries will be ordered in the left margin of the homepage); stencils to be developed in coming weeks by R Watters
- Collecting AAP-owned media and entering it into a single SharePoint library; can media and copyrighted content be collected Academy-wide? If so, will the development of a PREP media library harmonize with the future goals of other divisions and their need for tracking and storing copyrighted media?
- AAP Style Guide (2013-2015); this is entirely dependent

- End-user documentation (PDFs, screencast, Jing) for editors and writers; Monica Batista is currently in charge of training volunteers and coordinating GoToMeetings.
- Questions for C Gomez:
    - Option for authors to send original content to an email address as a Word attachment. Can these documents automatically feed into a respective folder where those with read/write privileges (editors, managers, MCEs) can pull the content? This would reduce the number of people with access to the site from roughly 124 to less than 30. Also authors already know how to email Word attachments.
    - How will a basic, out-of-box SharePoint site integrate with IT's future plans to move to Outlook and Office 365?
    - Can content be tagged within the site?
    - Is their future potential for Skype integration so that absent volunteers can video conference into the meetings rather than rely on conference calling (our current approach, readily agreed upon by all members of PREP to be a less effective means of peer review)
    - Can content from SharePoint (i.e., completed Word manuscripts) be exported into Content Essence, thereby bypassing the manual data entry undertaken by M Batista, C Wiberg, and S Kropski
- Standard instructions for writers:
    - Should we set limits on # of permissions per submission?
    - Should we set hard deadlines for meeting-participation?
- Standard instructions for editors:
    - How do we deal with editors who do not participate (eg, Wilde)?
    - How do we approach editors who insist on a unique process (eg, Brown and Fisher postmeeting revisions)?
- Set up standard check-in comments and folders:
  1. Needs author review & resubmission
  2. Ready for copy editing
  3. Ready for meeting (comment made by MCE)
  Need naming convention for each of the templates (e.g., "_pd" or to Dennehy) so that it's easier for the editors to pull the content directly from the library page

- As a program, can we set participation minimums when scheduling meeting dates? (E.g., rather than scheduling according to when it is convenient for all 10 authors and the 2 editors, could we set our lower limit to 1 or 2 editors and 8 of 10 authors—in essence, moving from consensus- to majority-based scheduling.)
- How do we want to house permissions on the SharePoint site? Will permissions on SPoint integrate with our Operations Specialist's (G Theofanopoulos) current approach to tracking permissions?
- Establishing network with other MS software users (R Watters receive list of every Visio, Project, EndNote user in the Academy)? Internal listserves or chat forums for software-related FAQs? How can we further our Level-1 support base to include Academy employees outside of PREP?

- Consolidation of multiple assignments into single Word documents?

Advantages over ScholarOne

- Licenses have already been purchased (Cost: $0)
- Higher level of control
- Processes will be uniform across the high-level subspecialty site, meaning that out-of-office delays will be a thing of the past
- Internal development (C Gomez)
- Simple layout, U/I, U/X
- Internal control of rights/permissions
- Internal backup of content
- Internal training (training for ScholarOne is $100/hour after the first 3 complimentary trainings; Professional Development has already expressed an interest in bringing in external resources to train internal employees on SharePoint)
- Internal support (C Gomez—developer; Chris Wiberg, Suzanne Kropski, Ryan Watters, Monica Batista, George Theofanopoulos—level I support; other SharePoint users within DoSJPP and other divisions)
- Further integration with MS Products, all of which are currently licensed by the AAP:
  - Project: Schedules can be automated, exported for master calendars, and developed in conjunction with tracking of freelancers through the SharePoint site
  - Visio: Visio Pro can export workflows into SharePoint Designer, thereby allowing for future flexibility in terms of create custom workflows to meet the needs of individual subspecialties and managers. However, this service is not currently provided by the AAPIT. That being said, 2013 seems promising for more seamless integration of VSD/VDX.
  - Excel: Macros can be developed in Excel and exported into both Outlook Calendars and SharePoint calendars.
  - Office 365: Cloud-based collaborative tools will only improve when the Academy makes the inevitable shift to Office 2013 and takes advantage of SkyDrive technology
  - EndNote: Currently integrates with Word; EndNote Web (included in our current licenses with EndNote X5) can be used to digitally store all of our references and make it easier for volunteers to pull references from a SharePoint-based .enl library. (Some of our volunteers already use EndNote.)
  - Skype: MS currently owns Skype and will begin substituting all MS messenger services with Skype accounts beginning 4/8/2013. Future SharePoint development may incorporate video-chat technology; this may be a more attractive alternative in cases where volunteers cannot attend peer review in person

- Shorter build time (once the project has been accepted by IT, an out-of-box SharePoint site can be ready for beta within 1 to 2 days)
- Internal media library—a master subspecialty site can allow all users to pull media from a shared library of items for which the AAP currently owns copyright; this media will also be backed up internally
- The SharePoint homepage can be easily manipulated to send messages to authors, update volunteers about developments with PREP, etc
- Group discussion features on SharePoint allow all authors to contribute to conversations on more "controversial" content; this is much less confusing than our current email-based system. 2013 (not the proposed V1 build) builds upon the blurring of lines between team sites and social networking.
- A single subspecialty site can also act as a repository for shared PDFs of AAP policies, public domain articles, an AAP Style Guide (2015), and writer training materials
- ScholarOne is especially functional for random submissions from multiple sources. However, this level of functionality is not necessary for PREP, where the number of submissions, writers, and editors are defined from the onset. The level of complexity of the PREP workflow doesn't require the capital necessary for a custom ScholarOne build.

The following are screenshots showing some of SharePoint's out-of-box functionality. These screenshots are taken from the full-rights version of the SharePoint site developed for the AAP's *Bright Futures*, 4th edition. Images are courtesy of J Faletti.
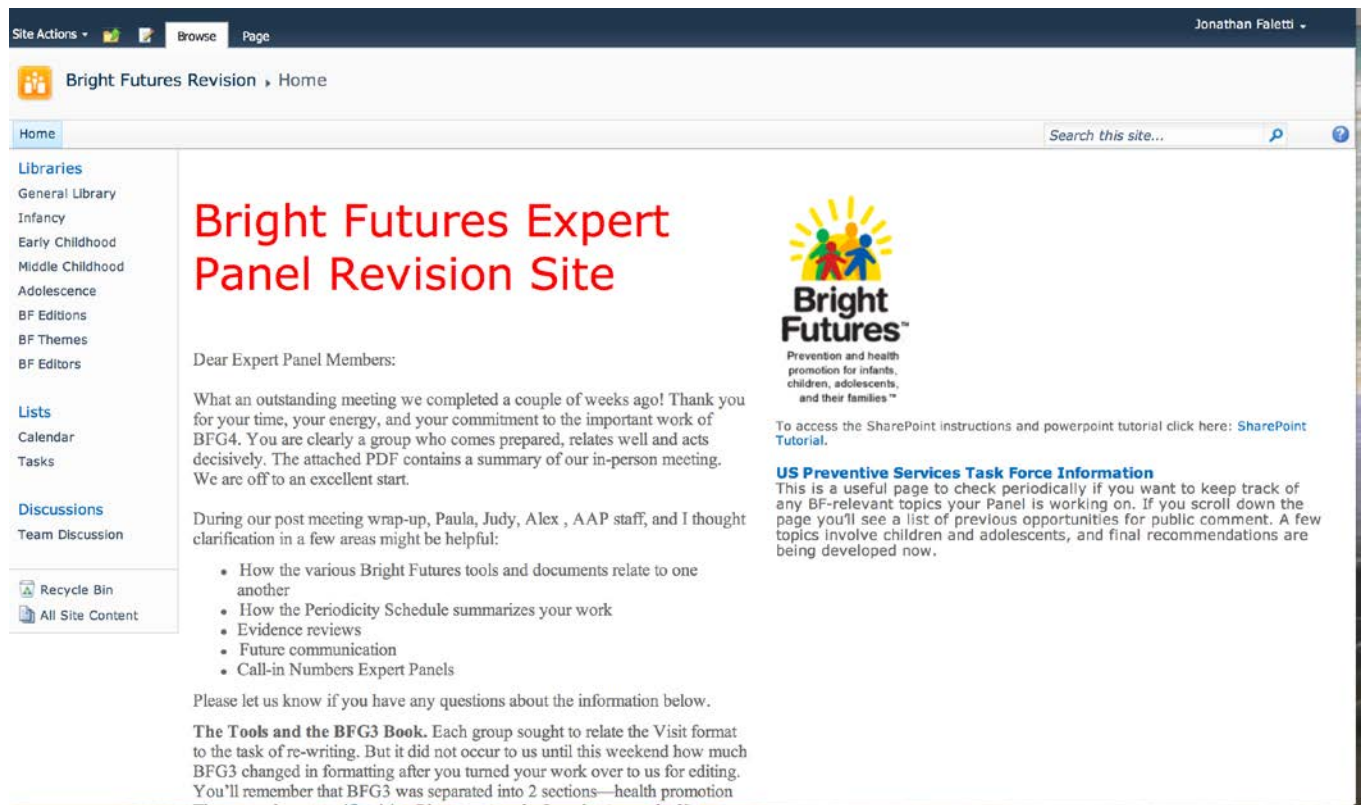

Image 1. The above is the basic, out-of-box SharePoint homepage. Libraries are easily accessible on the left from any web browser.
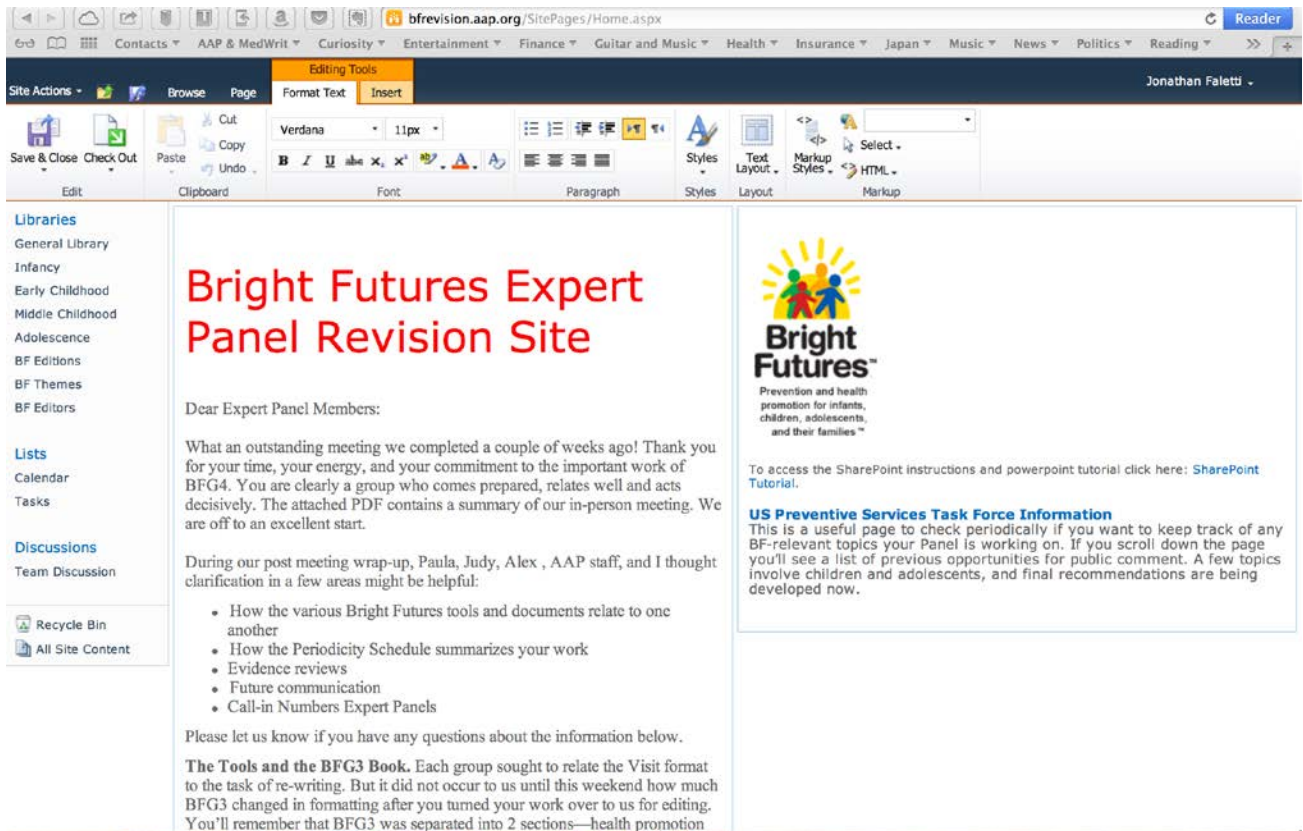
Image 2. The homepage-editing screen accessible by level-I support. Editing can be done within the browser, using already familiar MS "ribbon" style tools without the need for opening SharePoint designer or any hard drive-based software.
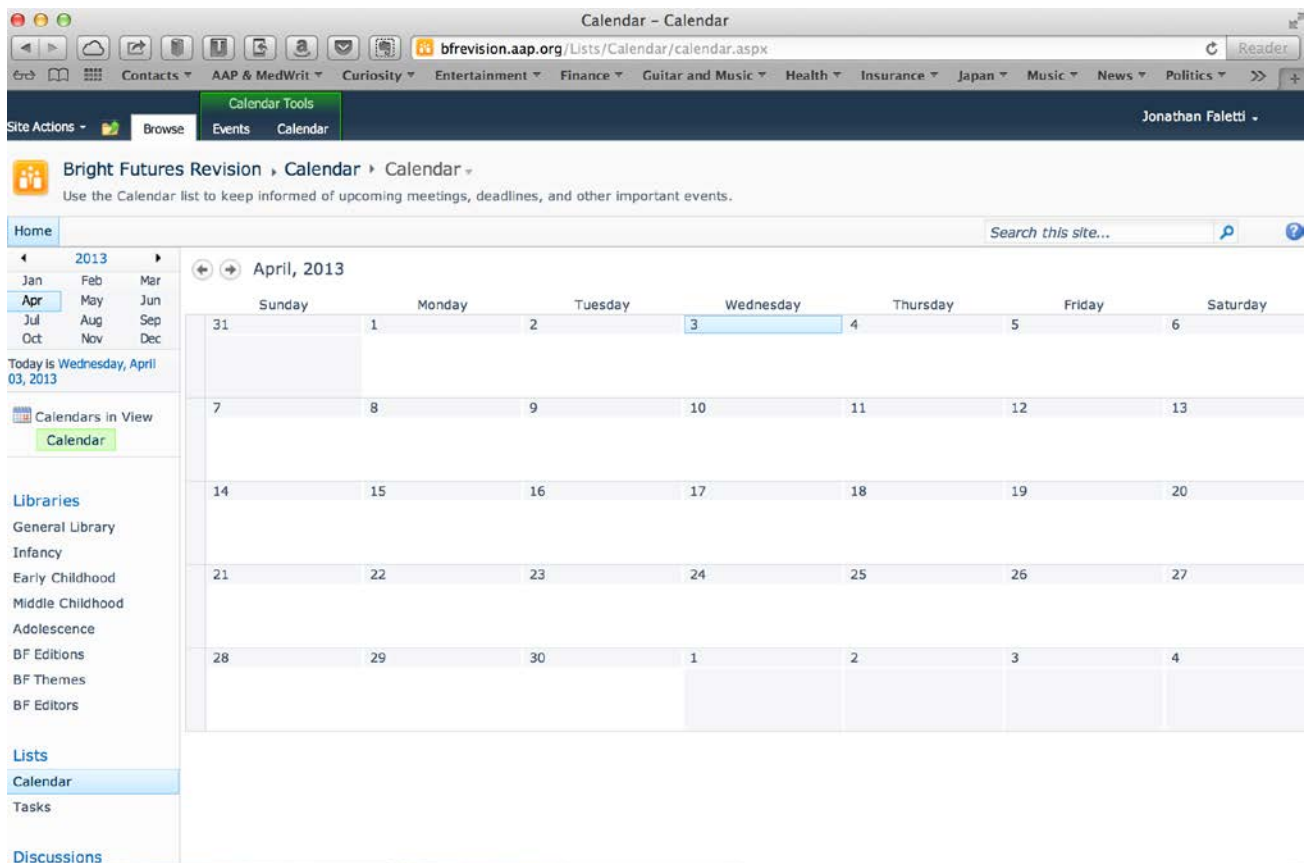
Image 3. The calendar screen. The calendar is another out-of-box feature that can eventually be integrated with Outlook 365, which should be fully implemented by AAP IT before the start of the 2013-2014 fiscal year.
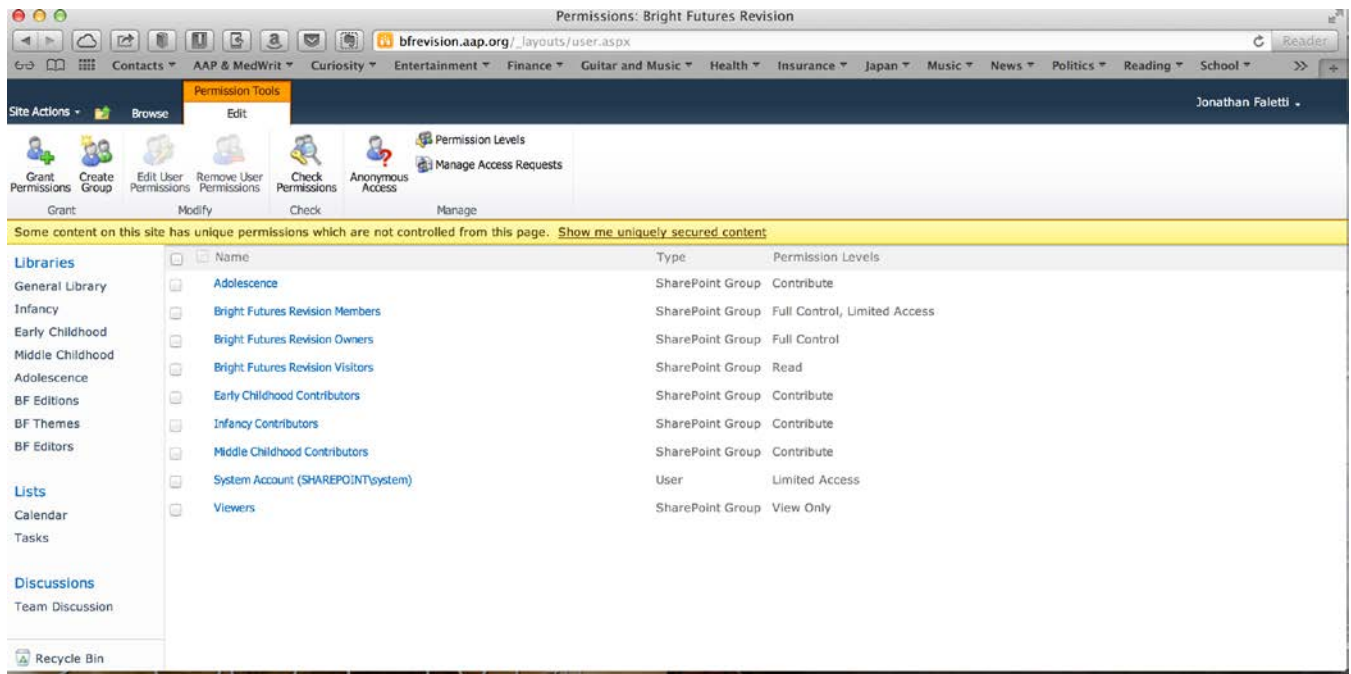
Image 4. SharePoint permissions page. Rights can be changed on the fly for individual authors.
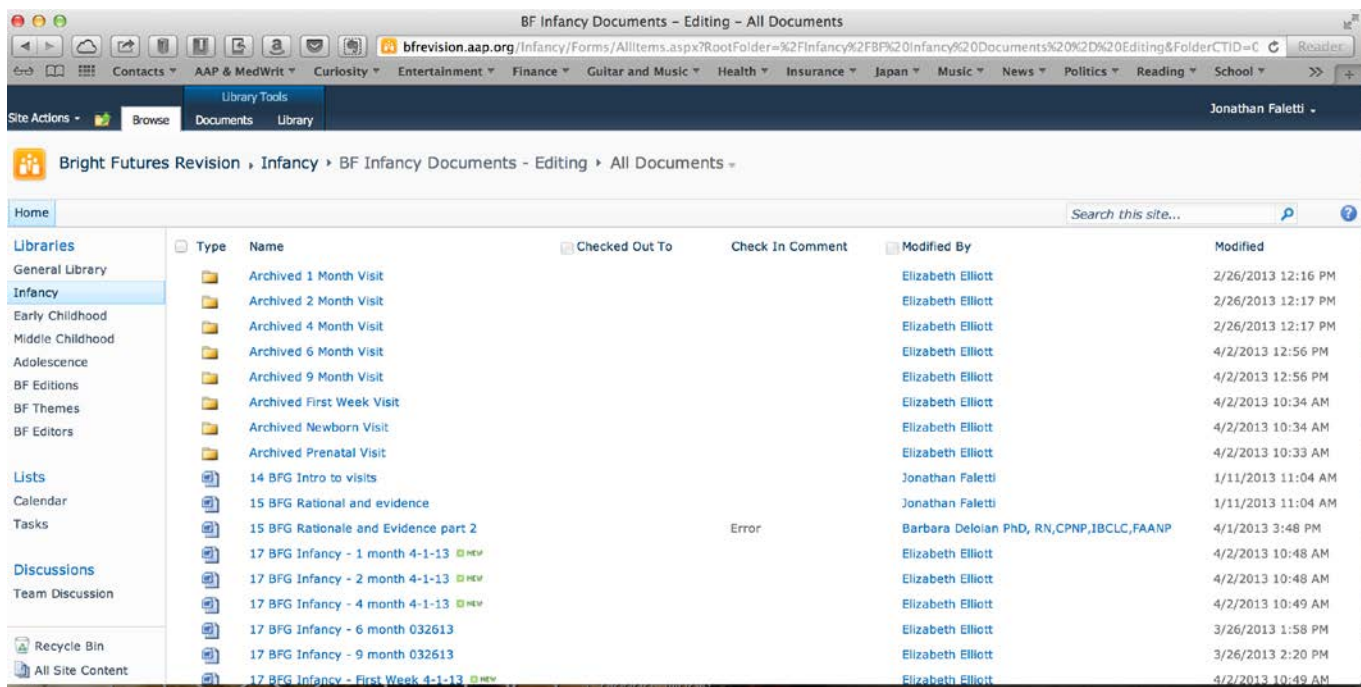
Image 5. This is a typical, out-of-the-box SharePoint library. Author's name are included in the library listing once the author checks-in content to the library. This negates redundancies and solves the problem of different editors, managers, and copy editors using different naming conventions for version control.
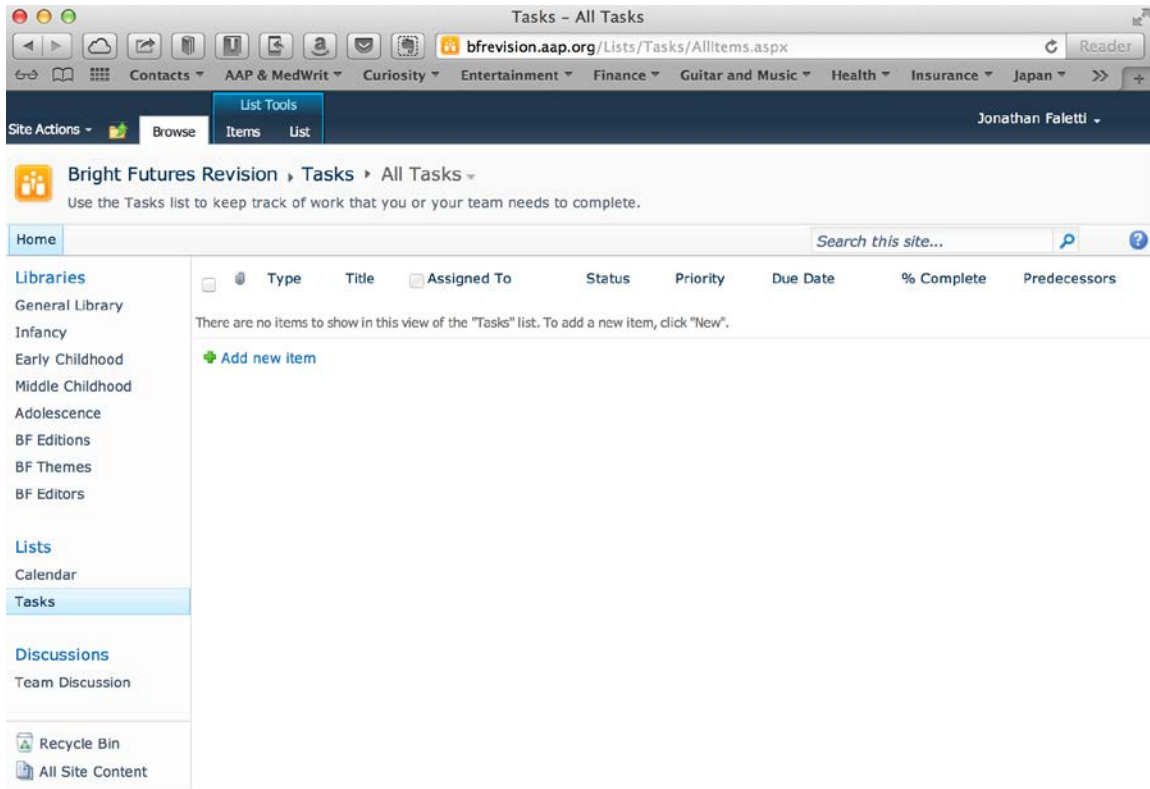
Image 6. SharePoint task assignment. Tasking is often overlooked in current processes but could prove beneficial with future implementation of Microsoft Project. Automation of processes (potential future goal; not included as an out-of-box feature on this level) is possible with SharePoint 2010, more so with SharePoint 2013. Editors can be trained to assign tasks to authors. The assigned tasks can sink with the SharePoint calendar, which can potentially sink with Office 365 and send email notifications to the authors. A more simplified version of task-assignment could include editors having write privileges on the homepage, where they can include direct messages to all the volunteers at once. However, such high-end integration should only be considered in versions 2 and further of the SharePoint team site.

Sample Subspecialty Production Schedule

Production Stage	Deadline	Day	Responsibility
P-Review (Beginning 12/31/13)	1/1/2014	0	NA
Assignments to Authors	1/1/2014	0	Managers, Editors
P-R'ed Content to SharePoint	1/3/2014	0	MCE
Permissions Request to Coordinator	1/6/2014	5	MCE
Final MCE & Proof (No postmeeting author rev)	1/15/2014	14	MCE
Postmeeting revisions (limited) to SharePoint	1/15/2014	14	Authors
Final MCE & Proof (postmeeting AU rev)	1/22/2014	21	MCE
Publish (Ongoing)	1/29/2014	28	Manager
Preview for Editors & Approval Complete[1]	2/5/2014	35	Manager
Submissions (A) to Sharepoint	2/12/2014	42	Authors
Submissions (A) to Editors*	2/19/2014	49	Manager
Submissions (B) to Sharepoint	3/12/2014	70	Authors
Submissions (A) to Copy Editor*	3/12/2014	70	Manager
Submissions (B) to Editors*	3/19/2014	77	Manager
Submissions (B) to Copy Editor*	4/9/2014	98	Manager
Copy Edited Submissions (A) to Meeting-ready	4/9/2014	98	MCE
Copy Edited Submissions (B) to Meeting-ready	5/7/2014	126	MCE
Begin CS Preparation for P Review	5/14/2014	133	Manager
Submissions Previews to SharePoint*	5/28/2014	147	MCE
Peer Review	6/4/2014	154	NA

* Indicates previously manual tasks (can be largely automated through implementation of SPoint)

[1] Process is assumed to be ongoing as permissions are approved, and questions are mapped and entered into database, but permission process should begin within 5 days of peer review completion

Earliest next peer review: 11/4/2014 (Day 154 of next cycle)
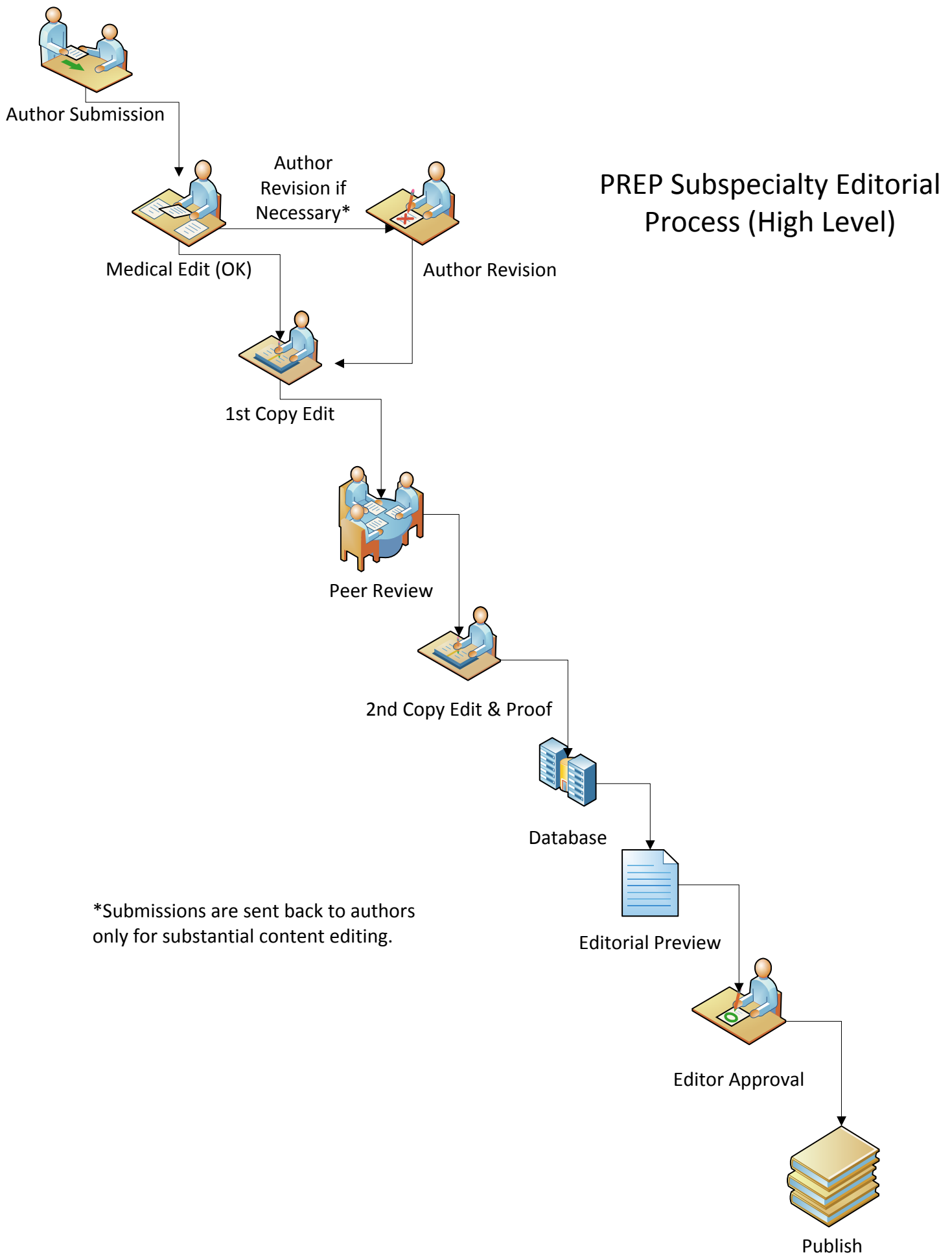
Comments:
- Total process is 22 weeks (154 days), or roughly 5 months
- Allows for 80% minimum submission rate (96/120) annually
- Authors given 10 weeks to complete 6 submissions (1 wk buffer each set, 12 wks for 6 Qs)
- Time between meetings must be >5 months
- Two cycles = 308 days, allowing 57 days of flexibility annually
- Macro development (RW)--managers can deliver deadlines, CalDAVs, etc in-meeting
- (Future integration) MS Project, SPoint, Outlook 365--master subspecialty calendar & workflow
- Original submission to premeeting content edit & MCE, T = 8 weeks (up to 14)
- Master Cal precludes >2 subspecialties copy edited in house at same time by same MCE
- Authors have 2 weeks to return postmeeting revisions to MCE for final copy editing
- MCE has 1 wk for final CE/proof of postmeeting revisions (should be discouraged)
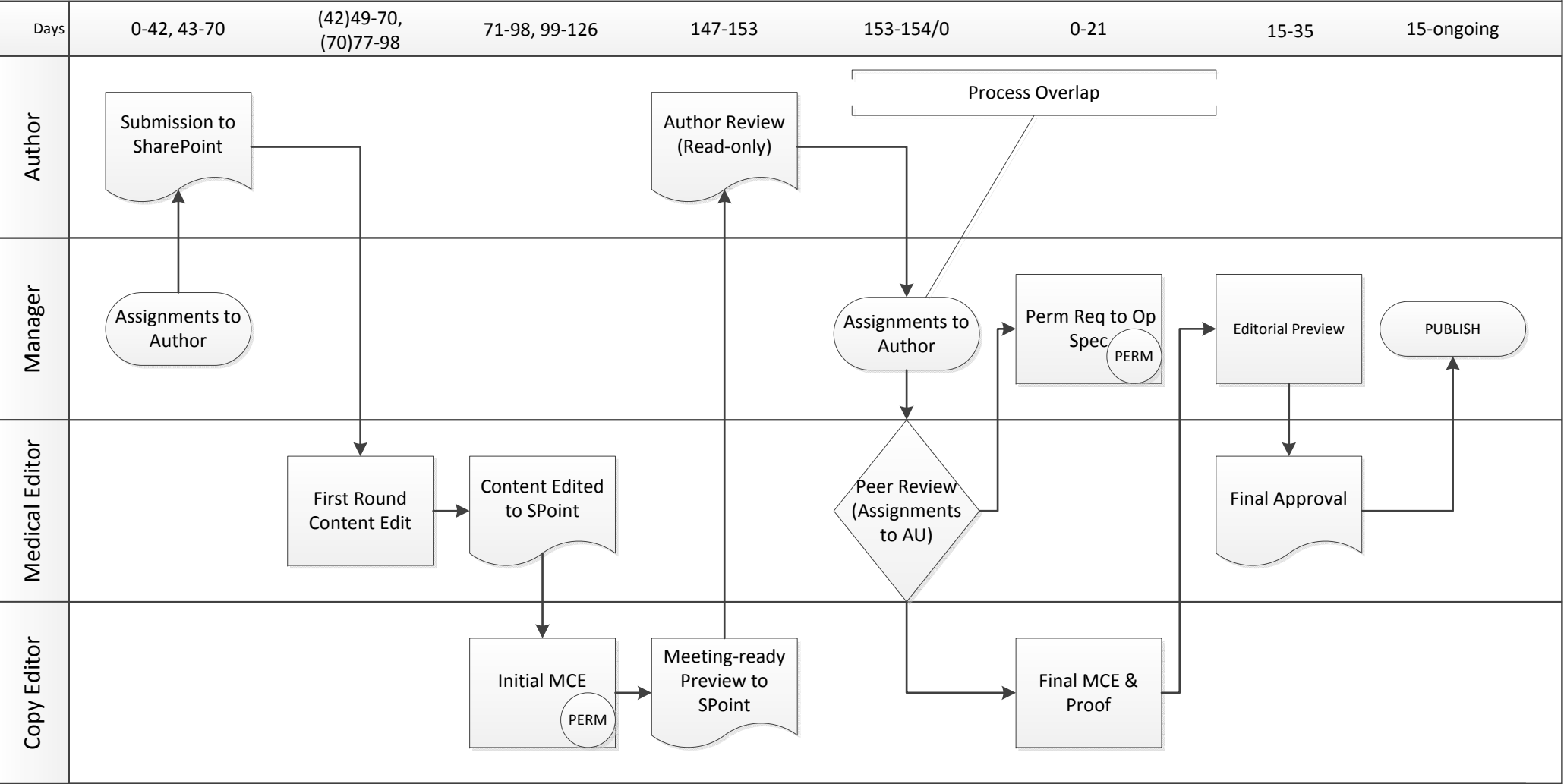
SharePoint Potential Savings (yearly)

Item	Cost	
ScholarOne (Yearly)	$	10,000.00
ScholarOne (Build)	$	2,000.00
2 Freelance copy editors: document management costs ($2400 per year per subspecialty for 4 subspecialties)	$	7,200.00
30% of current MCE's scheduled work hours	$	21,000.00
Beena NeoReviews Plus document management	$	6,000.00
Total	$	46,200.00
50%	**$**	**22,600.00**

*MCE, medical copy editor

Author Submission

Author
Revision if
Necessary*

Medical Edit (OK)

Author Revision

PREP Subspecialty Editorial
Process (High Level)

1st Copy Edit

Peer Review

2nd Copy Edit & Proof

Database

*Submissions are sent back to authors
only for substantial content editing.

Editorial Preview

Editor Approval

Publish

Proposed SharePoint DMS-based PREP Subspecialty Workflow, July 2013 (T = 22 wks)

Days	0-42, 43-70	(42)49-70, (70)77-98	71-98, 99-126	147-153	153-154/0	0-21	15-35	15-ongoing

Author

Submission to SharePoint

Author Review (Read-only)

Process Overlap

Manager

Assignments to Author

Assignments to Author

Perm Req to Op Spec — PERM

Editorial Preview

PUBLISH

Medical Editor

First Round Content Edit

Content Edited to SPoint

Peer Review (Assignments to AU)

Final Approval

Copy Editor

Initial MCE — PERM

Meeting-ready Preview to SPoint

Final MCE & Proof

Internal Permissions Process

Process begins with first round of copy editing

Permissions

MCE fills req

Pending Request Posted to SharePoint

Peer Review

Mgr, Approved Permissions SPoint for **Operations Specialist (OS)**

OS begins permissions processing

Permissions Approved

Mgr enters attribution to fully proofed text

Publish

Processing Begins within 5 days of Peer Review conclusion

PREP Subspecialty Mockup

PREP Subspecialty Homepage

PREP Subspecialty > Home

Search this site...

Infectious Diseases

Adolescent Medicine

DBPeds

Critical Care

Nephrology

Hem-Onc

E-medicine

Endocrinology

Pulmonology

Neonatology

Media Library

CME & MOC

New Writers

Recycle Bin

All Site Content

PREP® Subspecialties
Pediatrics Review and Education Program

Welcome to the PREP Subspecialty website. This site is the single-stop portal for all AAP members and staff involved in the production of PREP subspecialty content. To the left you'll see our line of subspecialty products. Please click on the subspecialty with which you are involved. Once inside the subspecialty website, you'll be able to upload your submissions, edit content (board editors only), check on peer review meetings, coordinate your calendar for deadlines, and participate in group discussions.

Please click on your subspecialty to the left.

Media Web Part

▶

For the SharePoint and PREP subspecialty tutorial PDF, please click here.
For a video walkthrough of how to upload content to this site on a Mac, please click here. For PC, please click here.

PREP Subspecialty Mockup

Infectious Diseases Homepage

Site Actions ▾ 📤 | Browse | Page

👥 Infectious Diseases > Home

Search this site... 🔍 ❓

- Assignments
- Questions & Critiques
- Media Library
- Group Discussion
- Meetings
- Calendar

Welcome to the PREP Infectious Diseases homepage.

Reminder: this year's spring peer review will be April 18th and 19th. If you haven't already confirmed your travel plans, please be sure to contact Effie Tonkovic at etonkovic@aap.org.

Connect to *Red Book Online* here.

- 🗑 Recycle Bin
- 📄 All Site Content

PREP Subspecialty Mockup

Infectious Diseases Author Submissions (Check-ins and Checkouts)

Infectious Diseases > Author Submissions

Search this site...   🔍   ❓

Infectious Diseases Homepage

- 📄 Author Submissions
- 📄 Author Previews (1 Week Before Meeting)
- 📄 Post-Peer Review Author Revisions
- 📄 Finalized Content

Author Submissions

Type	Name	Checked out to	Check In Comment	Modified by	Modified
📄	Moffett 35	G Schutze	Paragraph added on clindomycin	G Schutze	3/4/2013 1:31 PM
📄	Sood 34	P Dennehy		Sunil Sood	3/8/2013 9:32 AM
📄	Sabella 21			C Sabella	4/1/2013 7:22 PM

➕ Add document

- ♻️ Recycle Bin
- 📄 All Site Content

PREP Subspecialty Mockup

Infectious Diseases Discussion

Browse   Page

Infectious Diseases > Group Discussion

Search this site...   🔍   ❓

Infectious Diseases Homepage

Posted by	Post

Posted: 3/9/2011 4:06 PM

View Properties   🗎 **Reply**

Discussion Post Title
Lorem ipsum velit sonet cu duo. Harum numquam id sea, ne his delenit fastidii perpetua. Te eam laoreet disputando, eu augue zzril est. Qui ex eius erroribus assentior, in pro discere delenit definitionem, mea fabulas lucilius qualisque te. Mel ad numquam electram elaboraret, ei pro nibh vidisse docendi. Id est singulis argumentum, et eos quem porro euripidis, unum duis vidit nam ea.

Jane Doe ☐ |

Posted: 3/9/2011 4:06 PM

View Properties   🗎 **Reply**

Discussion Post Title
Lorem ipsum velit sonet cu duo. Harum numquam id sea, ne his delenit fastidii perpetua. Te eam laoreet disputando, eu augue zzril est. Qui ex eius erroribus assentior, in pro discere delenit definitionem, mea fabulas lucilius qualisque te. Mel ad numquam electram elaboraret, ei pro nibh vidisse docendi. Id est singulis argumentum, et eos quem porro euripidis, unum duis vidit nam ea.

Jane Doe ☐ |

Posted: 3/9/2011 4:06 PM

View Properties   🗎 **Reply**

Discussion Post Title
Lorem ipsum velit sonet cu duo. Harum numquam id sea, ne his delenit fastidii perpetua. Te eam laoreet disputando, eu augue zzril est. Qui ex eius erroribus assentior, in pro discere delenit definitionem, mea fabulas lucilius qualisque te. Mel ad numquam electram elaboraret, ei pro nibh vidisse docendi. Id est singulis argumentum, et eos quem porro euripidis, unum duis vidit nam ea.

Jane Doe ☐ |

🗑 Recycle Bin

📄 All Site Content

☐ |

PREP Subspecialty Mockup

Infectious Diseases Calendar (Future integration with Outlook 365)

Infectious Diseases > Calendar

Search this site...

Infectious Diseases Homepage

PREP Infectious Diseases Calendar

April, 2013

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28	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	29	30	31	1	2

✚ Add

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PREP Subspecialty Mockup

Infectious Diseases Media Library

Infectious Diseases > Media Library

Search this site...

Infectious Diseases Homepage

| New ▾ | Upload ▾ | Actions ▾ | Settings ▾ | | View: | All Pictures ▾ |

Image	Image	Image	Image
☐ Image Name	☐ Image Name	☐ Image Name	☐ Image Name

Image	Image	Image	Image
☐ Image Name	☐ Image Name	☐ Image Name	☐ Image Name

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PREP Subspecialty Mockup

Infectious Diseases Meetings

Infectious Diseases > Meetings

Search this site...

Infectious Diseases Homepage

PREP ID Peer Review April 2013

- We have 50 questions and critiques to review in this meeting
- Dr. XXX is not able to attend but will participate via conference call at 1:00PM on the second day of the meeting

Add new item

Attendees

	Name	Edit	Response	Comment
	G Schutze		Accepted	
	P Dennehy		Tentative	

Manage Attendees

Agenda

	Subject	Owner	Time
	Breakfast & Introductions	Board	7:00 - 8:00
	Peer Review	Board	8:00 - 12:00
	Lunch	Charles Chaplin	12:00 - 12:30
	Business Meeting	Suzanne Kropski	12:30 - 1:00
	Presentation on SharePoint	Ryan Watters	1:00 - 1:15
	Peer Review	Board	1:15 - 5:00
	Pickup for Dinner at Coopers Hawk	Board	6:15 (at hotel)

Add new item

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