GOKb R3.0 - Review Requests Development

Scope

This document sets out the enhancements proposed for GOKb R3.0 to the Review Request (RR) functionality.

The aim is to provide the Editor and those involved in processing GOKb data in CRED environment with a sufficient level of monitoring and delegation functionality that will:

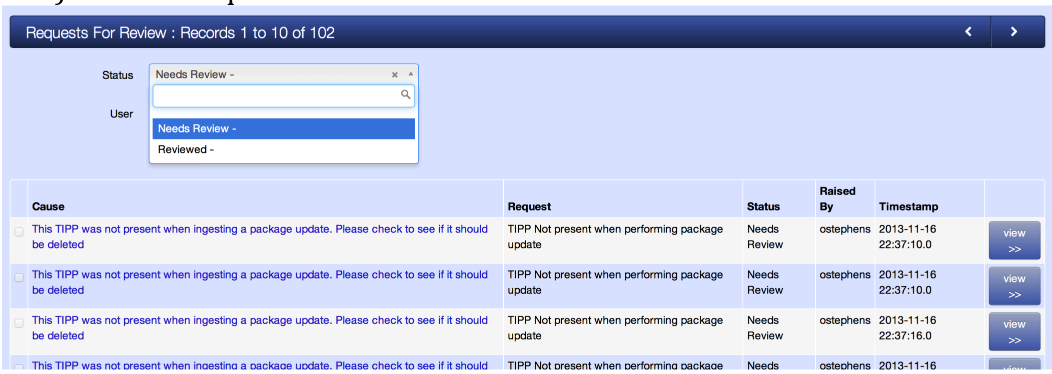
- Present a clear view of the status and allocation of records flagged for review;
- Enable efficient team working, including generation of new RRs, re-allocation and closure;
- Provide a log of all RR activity;
- Keep things simple at the start, whilst being structured to be extensible as practice emerges;

Table of Contents

1 - Existing Forms

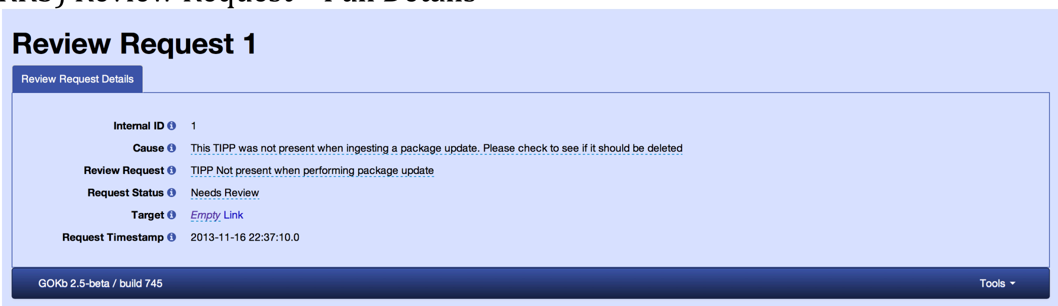
These forms images are presented for information

RR1) Review Requests List



RR2) Review Request Details - Two Panel

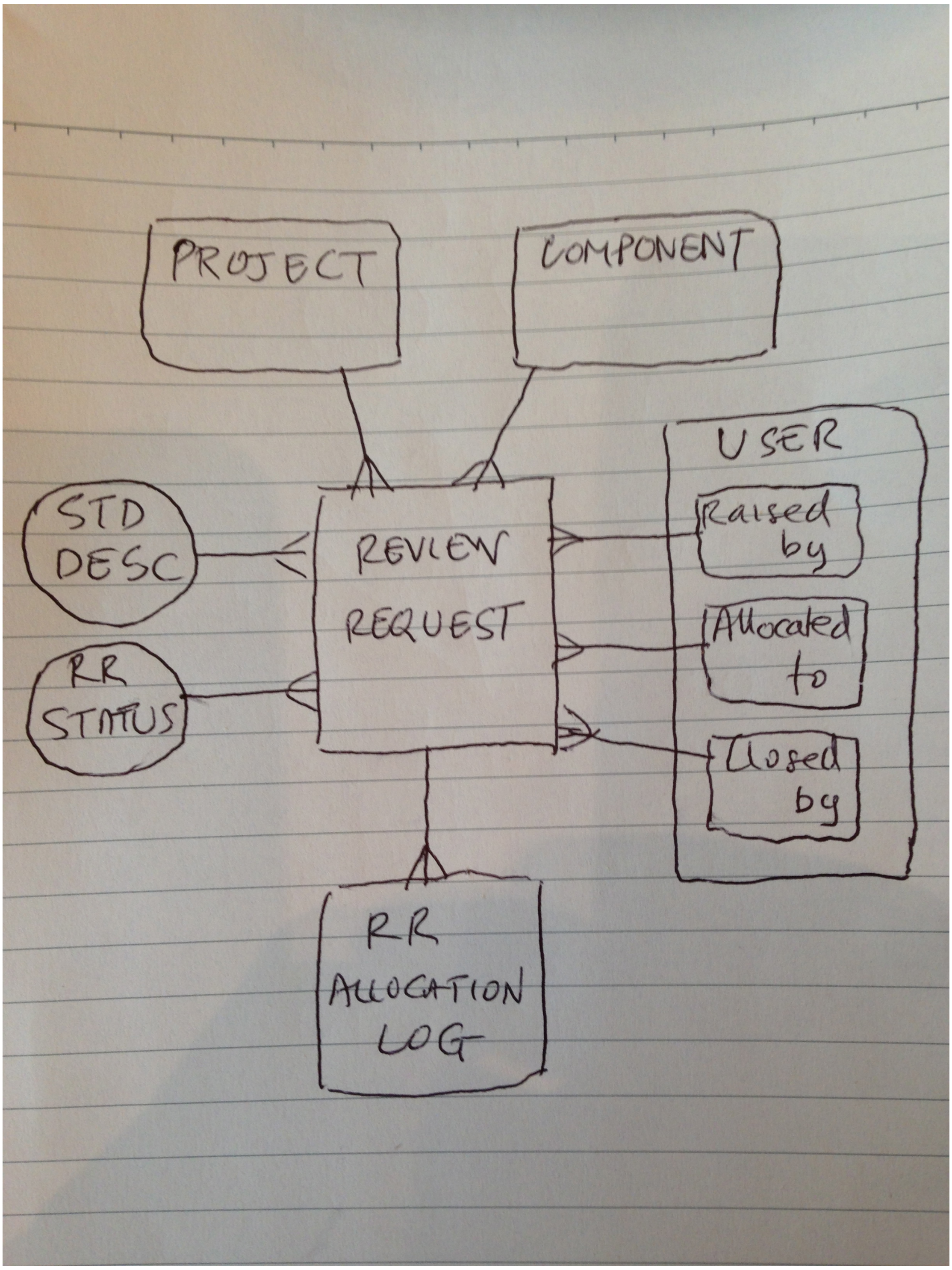
RR3) Review Request – Full Details



RR4) TIPP with Review Requests Tab

2 - Proposed Data Model

Not strictly compliant data modeling style!



3 - Proposed Entity Attributes

Two new Ref Data categories are required (RR Status, RR Std Description) plus RR Allocation Log and changes to Review Request

The only human editable attributes are marked *.

Review Request Entity

RR ID	PK	Review Request ID
RR Status	FK	* **Ref Data** – Open, Closed, Deleted (Partially managed by the system)
RR Std Description	FK	**Ref Data** – replaces hard coded values
Project	FK	Originating Project – CRED needs to be one
Component ID	FK	Component in question (TIPP in R3.0)
Raised by	FK	User creating in Refine or CRED
Allocated to	FK	*User currently allocated to (Starts same as Raised but can be changed)
Closed by	FK	* User closed by in CRED
Raised date	Date	Date raised (system date)
Allocated date	Date	Date of current allocation (system date)
Closed date	Date	Date closed (system date)
RR URI	URL	Persistent URL (system generated)

RR Allocation Log Entity

New record generated for every change in <RR Allocated To>

RR Allocation ID	PK	Review Request Allocation ID
RR ID	FK	Review Request ID
Note	Txt	* User note (single field)
RR Activity URI	URL	Persistent URL (system generated)

The following are in Review Requests

(RR Status)	*>>*	** RR Status for this RR ID*
(Allocated to)	*>>*	** Allocated To for this RR ID*
(Date allocated)	*>>*	*Allocated Date for this RR ID*

4 - Required Refine Functionality

- Refine auto-generates Review Requests (all fields populated except Closed by / Closed Date).
- Each RR requires one RR Allocation row, automatically allocated to the Refine User – unless we want to allow specification as part of the processing dialogue).

5 - Required CRED functionality

A) Review Requests form – update of RR1/2/3 above – with filter and batch actioning

B) RR Allocation Log form – new form (only the list; 2-panel and single record views not required) – with filter and batch edit

C) My RR Allocations – whilst this is just a filtered version of (B), it may be attractive as a specific menu option

D) TIPP List

- See 'open' Review Requests count
- 'Create Review Request' button
- (?) Review / Update TIPP Review Requests list

E) TIPP Details with RR tab – update of RR4 above
[Note – Would this be better below the tabs layout]

- See 'open' Review Requests count on tab
- 'Create Review Request' button
- Review / Update TIPP Review Requests list

Email alerts - Generate an email at user configurable frequency to the Allocated User to notify that new RRs have been created (either new RR records or edited allocations); e.g.

> *12-25-2014 03:00 - You have 16 new Review Requests - 11 in Project A; 5 in Project B) – review at http://www.mylistform.html*

6 - Save for later

The following functionality has been discussed / envisioned. However, it is recommended that any further implementation should await the development of editorial practice.

	R3.0 version	Future ideas
1	RRs only apply to TIPPs	Offer RRs for any component in Refine and CRED
2	One TIPP per RR	RRs for groups of TIPPs (or whatever)
3	RRs only allocated to individual users; User IDs can of course be created for a group (e.g. Elsevier Editors, Jisc Data Managers)	Could be allocated to Groups – assuming that concept is introduced in to the User data model
4	There are no escalation levels	Levels may need associated rules and workflows - best left till practice is clearer
5	Alerts are only by email, processed at frequency set by user, covering RR allocations	Greater granularity of messaging and other channels for delivery could be considered
6	The RR Allocation list will not contain 'Previous' / 'Next' links	Despite the new record processing overhead this ease of navigation may be desirable
7	No deadline dates on allocation	Could add extra attributes to manage workflows
8	Only one Notes field at RR Allocation level (suitable for 'my notes' but visible to the next person or any other GOKb user)	Multiple notes / Configurable notes field names
9	Only user-created RRs in CRED	Auto-creation of rules based RRs in CRED (perhaps based on the level of editor trust)