



Performance Planning and Review (PPR)

SECTION I: Basic Information

Name of employee	Susanne Lantos	Appointment group & level	IS3
Branch/Institute	CISTI – Publishing	Position Classification	IS3
Name of Supervisor	Carolyn Brown	Name of Reviewing Officer	Cameron Macdonald

Note: Completion of this document is to be accompanied by review of the content of Section 3.2 of the Human Resources Manual as well as of the appropriate competency profile for the employee.

SECTION II: Performance Review

Review Period: September 2007 –March 2008

Achievement of Work Objectives

Key Work-Related Objectives and Plans

Depending on requirements, the volume of work for any particular section below will vary.

General

- Complete assigned project tasks on schedule
 - Susanne works with her supervisor to set target dates and revise them as required; consultant turnaround times are often unpredictable; given these parameters, Sue meets expected schedules
- Maintain regular communications with colleagues about project or implementation progress
 - Sue keeps her supervisor and affected colleagues in the loop about progress by arranging ad hoc meetings, chatting with those involved, and copying everyone involved on email communication
- Communicate with manager as necessary to discuss priorities
 - Susanne is very patient with her overworked supervisor! Sue has had many conflicting priorities during the period, and she asks her supervisor (as well as colleagues) to set priorities. This is a useful challenge to the group to decide on their values and communicate them to Sue.
- Work with the Production application support technician to support the XML system, through frequent meetings, ad hoc communication about issues, invitations to each other's meetings, etc.
 - Susanne has established an excellent relationship of mutual creativity and innovation with her counterpart in production, Judy Hum. Together, their "dynamic duo" team has raised, cleared out, and resolved many tenacious, complex, or just irksome problems. In this regard, I would like to mention Sue and Judy's combined initiative and leadership on the problems with Greek entities.

Editorial software

TRAINING

- Responsible for end-user (staff or contractor) training in eXtyles, XMetaL, MathType, and MathFlow
 - Sue conducted at least 10 eXtyles and XMetaL training sessions for both in-house staff and contractors during the period, including remote training sessions. She received thanks from three new contractors (see attached); most of the trainees went on to work successfully in the software. There was some difficulty with one staff member, who declined training and did not accept remedial help. In this regard, Sue, the staff member, and another manager expressed concern

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about communication on the part of both people involved. Sue accepted coaching from her manager on this situation working with a difficult person. She used the dilemma to improve her communication skills and learn for future situations.

- **Maintain training materials**
 - Sue continuously updates training materials and communicates this information to staff. Recent updates include 21 different sections.
 - Sue also rearranged the training manual sections last year, based on feedback from contract editors who took the remote training courses. This involved renaming all files and organizing a table of contents for each training session, which varied depending on the target audience.
- **Training of back-up personnel as required, including documentation of procedures**
 - Sue discussed with her supervisor the need for a back-up, especially during planned absences. A manager with previous XML experience agreed to serve as back-up, which was helpful. However, a more committed back-up with greater experience in support for this software will be arranged in future.

MAINTENANCE

- **Serve as primary liaison with consultants (i.e., Inera, XMetaL manufacturer) concerning production issues (whereas development issues may be dealt with by development team)**
 - Sue has served as liaison with Inera, Design Science, and Just Systems, submitting requirements and getting quotes and timelines from these consultants for submission to her manager. During this period, Sue worked with the manufacturers to do programming for MathType and eXtyles export filter. As well, she conceived and designed an XMetaL tool that she worked with Just Systems to program. (See also Development.) Sue excels in communicating requirements clearly and succinctly, as well as in a friendly, approachable way. She passes along maintenance contracts to the manager as required. This year, Sue attended the eXtyles user group meeting, which enabled her to keep up to date with Inera's developments.
- **Responsible for maintaining eXtyles rules and testing all rules, and documenting decisions and actions. Vet rules with Style Committee or RP French editors when appropriate**
 - Sue set up a system for requesting and implementing changes to eXtyles rules, consisting of tables that function as documentation of the decisions and actions. Sue's systematic approach with this has helped address and resolve many of these issues. Sue (with Judy Hum) are regularly invited participants at Style Committee. This enables technical considerations to be brought to the decision-making process, and decisions to move smoothly to technical implementation.
- **XML DTD: Primary responsibility for maintaining XML DTD, in collaboration with the innovation coordinator, the production manager, and the manager of journals**
 - Sue took XML training at Algonquin College during four weekends, which improved her understanding of XML and DTDs. In discussions, she clearly understands our DTD and can address issues affecting the DTD with confidence. She has recently made six changes to the DTD to resolve issues that have arisen.
- **Document procedure for modifying XMetaL CSS and toolbar**
 - No requirement in this area during the period.
- **Liaise with T&R to help support installations of editing software**
 - Sue troubleshoots installations of eXtyles, XMetaL, MathType, and MathFlow, and reinstalls as required to take this chore away from T&R. During this period, she worked with a contractor whose home installation of eXtyles was not working. This included liaison with T&R, reinstallation of software, etc. The problem was eventually resolved.

END USER SUPPORT

- **Facilitate XMetaL user group meetings for editors**
 - Sue holds regular meetings for the editors, and these generate useful feedback and information. Sue passes this information along to her supervisor, Style Committee, and other colleagues as needed.

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- Documentation of eXtyles, XMetaL, MathType, and MathFlow for users
 - Sue maintains training documentation (see Training), as well as documentation of what's new in each rollout of software. She sends updates to all users when software is upgraded or changed.
- Responsible for trouble-shooting and working with other staff to find solutions to problems in order to keep editorial work progressing smoothly
 - Sue has a steady stream of troubleshooting requests. She is patient and helpful in almost all situations. See attached messages from colleagues thanking her for solving bothersome problems. Recently, to allow her to do development, she has put aside "protected time" and restricted the hours when she is available for troubleshooting. This has had a positive effect of forcing her colleagues to think twice about asking for her assistance; they must formulate and communicate the problem first, which makes troubleshooting more efficient.
- Responsible for establishing and maintaining logs to track production problems
 - Sue maintains an application issue tracking and reporting spreadsheet, as well as eXtyles and XMetaL support logs.
- Support RP Editorial staff during journal rollout
 - During this period, we have had several journals move to the XML-based system (CJCE, CJES, CJFAS) and initial meetings have been held about the final two journals (CJP, CJC). Sue has played a key role in analyzing each journal to find any discrepancies necessitating development, addressing potential workarounds and solutions, training and supporting staff, helping set rollout timelines, etc. Sue's work in this area exceeds expectations.
- Assist in journal production as necessary to aid EAs and POs to meet their deadlines in new system (this could include editing, premarking, proofing, etc.)
 - Sue has not been asked to edit manuscripts during the period. She frequently premarks manuscripts as part of troubleshooting or feedback after training.
- Increased support role for web publishing system, in conjunction with production application support technician
 - Sue regularly helps troubleshoot HTML and PDF publication system for editors and web staff.

DEVELOPMENT

- Participate in the configuration and use of the new help desk system that RP will use for production issue tracking
 - The new service request and change request help desk (in Footprints) was rolled out. Sue learned how to submit requests in the new system, including how to scope out requests before sending, what information to include, choice of product, assigning priorities, etc.
- Test new developments by the vendor for work done in Xmetal, eXtyles, MathType, and MathFlow, as well as new versions of Word and any proposed new software
 - Sue has looked at the new version of Microsoft Word with an eye to eventual migration. There has been no requirement yet for testing of eXtyles or XMetaL changes during this period.
- Sue is an active participant in development of software in anticipation of journal rollouts and the changing needs of RP. This work involves programming macros, programming software with help from software tech support; programming using XMetaL Developer (Visual Studio Basic) software; DTD development; designing software systems and tools (such as the tool for Greek entities added to XMetaL); coordinating software to ensure smooth flow throughout XML system (for example, many instances of software miscommunication between MathFlow and layout; coordination of Greek entities from Word to XML to HTML; etc.); communicating with consultants; set-up and testing of solutions; assessing software limitations and suggesting alternate solutions.

French language training

Sue has taken initiative and shown great interest in improving her language skills. She took the standard examinations during this period (current level indicated below). As well, she suggested private lessons through

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École Creusot on site; because of her initiative, interest, and aptitude, this was approved. Sue is poised to achieve an across-the-board C-level in the next few years.

Other

Sue gave a speech on XML system to visiting editorial assistants from offices across Canada in June 2007

Overall Performance Rating: Fully satisfactory

(See Annex 3.2-B of the Human Resources Manual for choice of performance rating and related definitions)

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SECTION III: Work-Related Objectives and Plans

For Period:

SECTION IV: Career Aspirations *(to be completed by the employee)*

SECTION V: Recommendations pertaining to Language Training *(to include language profile to be achieved and related training plan)* **and/or Personal/Professional Development**

Language requirement of the position: English only

Employee's language level: CCB

SECTION VI: Certifications

a) By the employee *(Comments (optional))*

S. Lantos
Employee Signature *

28 March 2008
Date

* My signature indicates that I have been offered the opportunity by my supervisor to discuss and comment on the content of this PPR.

b) By the supervisor *(Comments (optional))*

G. Brown
Supervisor's Signature

Mar. 28, 2008
Date

c) By the reviewing officer *(Comments (optional))*

V. M. U.
Reviewing Officer's Signature

Apr 2 2008
Date

