Creating a person record

When a person joins a group, an administrator from the group should first check (e.g., by using Quick Search) if the person is already listed in the system, in which case the person should just have the relevant role in the group added, see Assigning roles to people. If the person cannot be found, a new record must be created. The New Person Wizard will guide you through the steps of creating a new person and user account while making sure you add all the mandatory information

Only some users, such as Super Users, can create persons. See Permissions and Editing Group roles.

To create a person

1. From the menu bar, choose File > New > Person. The Person Wizard opens.
2. Follow the instructions in the Person Wizard, and move from one screen of the Wizard to the next using the Next and Back buttons. Note that to create a normal person record, e.g, for an author, you should leave the Group author option unchecked.

   Fields marked by an asterisk [*] (e.g. Primary email) are mandatory and must be completed before you are able to move on to the next page.
3. When all details have been entered, click the Finish button. You will get confirmation that the new record and user account have been created, and will be able to open and edit the record details.

See more about the person fields in Editing a person, Style guidelines for names and contact information in Archie.

Using the Create Person Wizard

When you start typing in a field in a name or address, e.g. Department, a pick list allows you to select among values containing letters you have typed that already exist in the database for that field. The list is order by the number of existing occurrences (shown in parentheses).

Name and contact details

Family name, Given name and Primary email fields should be completed. The Family Name field should be used for people with a single name.

Checking for potential duplicates

The Person Wizard checks for duplicates. If a possible duplicate is listed, open the Properties by double-clicking on the name to see if this record is for the person you were about to add. If so, you must click Cancel to end the Person Wizard without creating a new record.

> *Tip: If the existing record does not have the role you were going to create the person with, it is easy to add the role while you have the person's Properties open as part of the duplicate check. See Assigning roles to people.*

Contact address

You must enter either a Work or Home address.
The Organization field should be left blank if there is no institutional or organizational affiliation.
The City and Country fields are mandatory.
Addresses can be marked Private by ticking the 'Hide address' box in the Contact address section. Private addresses can be accessed only by the new person, those with the Maximum permission level in the new person's Primary Group (such as Super Users), and members of the ITS. See Privacy.

Primary Group and role in Primary Group

- Choose a Primary Group from the pull-down list. This list will include only those groups for which you have administrative access rights.
- Choose a role from the pull-down list. If the new person has more than one role in the Primary Group, you will need to create the record using one role, and then later edit it to add other roles, see Editing a person.
- If a role you need is not available on the drop-down list, you will need to add a role to the Primary Group's list of available roles
- The role assigned to the new person will determine the contact’s permissions within Archie, so please be careful to select the proper role.

Settings

- You can set privacy settings for a person's email addresses, mobile phone number and Skype name. This means that this information can only be accessed by the new person, Super Users of the new person’s Primary Group, system administrators

Creating a linked user account

To allow all users to view and amend their own contact details, a Cochrane Account will automatically be created for each new person record. The New Person Wizard will send an email message to the new contact's email below to ask the recipient to activate their Cochrane Account. If the user chooses not to activate the account, their person record will remain in the system.
The text of the email is as follows:

Subject line: *Cochrane Account: action required*

Dear $NAME,

You are receiving this message because either:

(a) You have been added to Cochrane's contributor management system by Cochrane staff (for example, this could relate to a peer review opportunity). You may use the link in this email to activate your Cochrane Account and review and edit your profile information.

(b) Cochrane staff have requested that you change your password.

To access your Cochrane Account, you need to perform the following action(s): Update Password. Click on the link below to start this process.

$LINK

This link will expire within 7 days.

If you choose not to activate your account, we will continue to store your data within our contact database. We never share personal data with third parties, and you can be assured that your personal data is being treated respectfully and securely. If you wish your contact information to be deleted, please email support@cochrane.org

Kind regards,

The Cochrane team

Cochrane
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