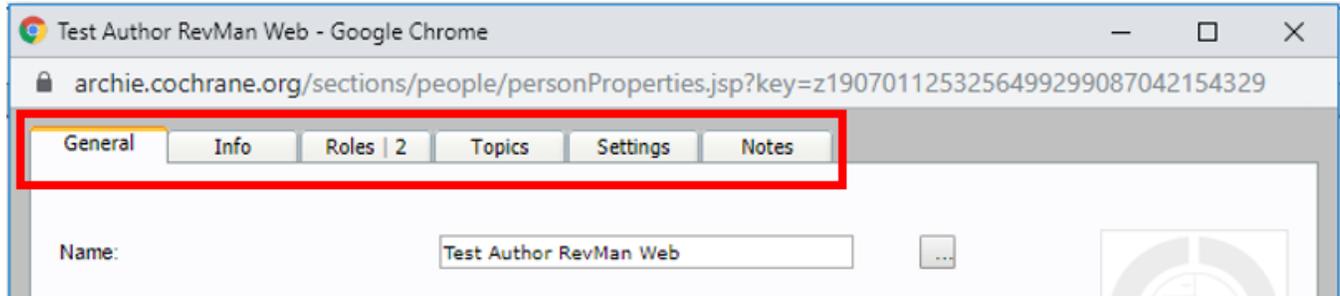


# Editing a person record

Person records can be edited by users themselves (if they have access to Archie) and those with the relevant [permissions](#) in the person's Primary group.

If you cannot edit a person record because your group is not the Primary group, you can [suggest changes](#) instead.

Editing a person is done through the person's [Properties](#), which has information organised under a series of tabs.



- **General** - Contact information such as name and address, [photo](#), ORCID ID and Primary Group information.
- **Info** - Tells you when the record was created, last modified and verified; displays the current time in the person's local time zone (if the person has specified this under Preferences); shows the person's country of origin and sex; shows whether the person record is active or [inactive](#); and includes a button to generate a Person Report for the person. Data on country of origin and sex are optional and will be used only for monitoring and registration purposes. These data will be treated confidentially, which means that they will be accessible only to the owner of the record, Super Users in the person's primary group, and system administrators. If a person record is marked as a duplicate of another person, this is also shown on the Info tab.
- **Roles** - Assigning roles to people within your group is done here. Only those with the Assign roles permission (by default, Super User in a group and members of the ITS) can assign roles.
- **Settings** - Contains information about user accounts, privacy, bulk mailings and notifications. You can check whether users have activated their Cochrane Account, and see the date and time when they last logged in to Archie (either directly to the server or via RevMan). The Privacy settings allow Email addresses, mobile phone numbers and Skype name to be marked as private by ticking the 'Hide' boxes. Only the owner of a record, the Super Users of the person's primary group, and system administrators can access private addresses. The Notifications settings control notifications for particular events. For more information see [Messages](#).
- **Notes** - Notes for the person, see [About notes](#).
- **Subscription** - This tab will appear for anyone who has, or is eligible for, a complimentary subscription to *The Cochrane Library*, and provides information about that subscription. See [Complimentary access to the Cochrane Library](#).

## Open a person's Properties

1. Find the person you want to edit (e.g., with Quick Search)
2. Either
  - Right-click the name and choose Properties.
  - Double-click the name.
  - Click the name so it is highlighted and use File > Properties.

## Edit a name

1. From the person Properties, choose General.
2. Click on the button next to the person's name (...).
3. Edit the person's details in the fields provided.
4. Click Apply.

See also [Style guidelines for names and contact information in Archie](#).

## Edit an email address and Cochrane Account username

1. From the person Properties, choose General.
2. Choose email address to edit
3. Edit email address.
4. Click Apply.

**Note:** An email will be sent to the user's new primary email address to notify the user that the primary email on the account has been updated, and that the account username has also been updated to match.

See [Style guidelines for names and contact information in Archie](#).

## Add a secondary email address

1. From the person Properties, choose General.

2. Click on the pull-down list labeled Email and choose Email 2.
3. Add an email address.
4. Click Apply.

See [Style guidelines for names and contact information in Archie](#).

## Add a mobile phone number or a homepage

1. From the person Properties, choose General.
2. Add the mobile phone number or homepage address.
3. Click Apply.

## Link to an ORCID identifier

1. From the person Properties, choose General.
2. Click the Connect to ORCID link under the photo option. The ORCID window opens.
3. Sign in with your credentials. Archie automatically adds your ORCID ID to the person's Properties.
4. Click Apply to save the changes.

Note: Only those with High [person permissions](#) (typically MEs or Super Users) in a group can add the ORCID ID directly in to the person Properties of another user.

See the [Editorial and Publishing Policy Resource](#) for more information.

## Edit an address

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).

See [Contact address and Affiliations](#), [Style guidelines for names and contact information in Archie](#).

## Assign a new role to a person

See [Assigning roles to people](#).

## Confirm if the person's user account is active

See [Managing user accounts](#).

## Hide email addresses, mobile phone numbers or Skype name

1. Choose Settings
2. Under Privacy, check the appropriate box
3. Click Apply

See [Privacy](#).

## Validate information about a person

1. From the person Properties, choose Info.
2. Click Verify.
3. Click OK to confirm validation. A person who validated the person's information is recorded in the Verified option.