

# Creating a person record

When a person joins a group, a group Super User should check if the person is already listed in the system. If the person already has a Cochrane Account, add the relevant role in the group. See [Assigning roles to people](#).

If the person does not have a Cochrane Account, Super Users can create one using the New Person Wizard. See [Permissions](#) and [Editing Group roles](#).

## Create a new person record

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. To create a person record 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](#).

## 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 only.

## 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](#).*

## Personal contact details

City and Country fields are mandatory. Department and Organization can be left blank if there is no institutional or organizational affiliation.

When a contact is allocated the Document role of Author, Archie automatically duplicates the contact address and adds it as Affiliation (1) for that author in RevMan Web. All further changes to affiliations must be made in RevMan Web. See [Authors and affiliations](#).

## 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 and contact details. 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](mailto:support@cochrane.org)*

*Kind regards,*

*The Cochrane team*

*Cochrane*  
[www.cochrane.org](http://www.cochrane.org)

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